

SF Dept. of City Planning

COMMERCE AND INDUSTRY INVENTORY

San Francisco Department of City Planning
OASIS
June 1992





5/S

SAN FRANCISCO
PUBLIC LIBRARY
REFERENCE
BOOK

Not to be taken from the Library

SAN FRANCISCO PUBLIC LIBRARY



3 1223 03182 4387

*Commerce and Industry Element of the Master Plan
First Annual Inventory*

COMMERCE AND INDUSTRY INVENTORY

June 1992

*San Francisco Department of City Planning
Office of Analysis and Information Systems (OASIS)*

D
REF
338.079,C736,1992

Commerce and industry
inventory.

S.F. PUBLIC LIBRARY

3 1223 03182 4387

To: City Planning Commission


Commissioner Sidney R. Unobskey, President
Commissioner Frank F. Fung, Vice President
Commissioner M. Toby Levine
Commissioner Susan E. Lowenberg
Commissioner Ellis Smith
Commissioner Rudolf Nothenberg
Alternate Norman Karasick
Commissioner Thomas J. Elzey
Alternate Romaine Boldridge

This is the first of a series of Commerce and Industry Annual Inventories which will summarize San Francisco's basic economic indicators in a standard format over time. This Inventory also sets the background for review and update of the Commerce and Industry Element of the San Francisco Master Plan. Information included in this Inventory will be used to analyze in detail critical economic issues. Reports on these issues will be presented for public comment and review by government agencies. After these reports, the Department will prepare a Draft Commerce and Industry Element for public review and City Planning Commission consideration.

Early drafts of this Inventory were reviewed by Sally Nielsen of Recht Hausrath and Associates. The Bureau of Building Inspection provided building permit application data reported in this inventory. Miriam Chion researched and prepared this Inventory and Catherine Bauman assisted in writing it.

If you have any questions regarding this Inventory or would like to be notified of the availability of future Commerce and Industry reports, Inventories, or other documents please call or write: Miriam Chion, Department of City Planning, 450 McAllister Street, San Francisco, CA 94102, telephone (415) 558-6314, fax (415) 558-6426.

Lucian Blazej, Director, Department of City Planning	
Amit Ghosh, Chief of Comprehensive Planning	
Catherine Bauman	Pamella Maxwell
Alfon Chinn	Jasper Rubin
Miriam Chion	Alexander Shulze
Scott Dowdee	Winnie Tse
David Levy	



Digitized by the Internet Archive
in 2017 with funding from
San Francisco Public Library

Table of Contents

1.0 INTRODUCTION	1
1.1 Data formats	2
2.0 REGIONAL OVERVIEW	8
2.1 EMPLOYMENT, POPULATION, AND LABOR FORCE WITHIN THE BAY AREA	10
2.2 REGIONAL EMPLOYMENT BY INDUSTRY GROUPS	16
3.0 SAN FRANCISCO ECONOMIC INDICATORS	26
3.1 EMPLOYMENT	26
3.1.1 Employment by Land Use Activity	26
3.1.2 Employment by Industry Groups: 1972-1990	30
3.1.3 Employment Distribution by Commerce and Industry Districts	33
3.1.4 Employment Distribution by Establishment Size	37
3.2 ESTABLISHMENTS	39
3.2.1 Establishments by Land Use Activity and Commerce and Industry Districts	40
3.2.2 Establishments by SIC Codes and Commerce and Industry Districts	44
3.2.3 Establishments by Zip Code and Land Use Activity	50
3.2.4 Establishments by Size Class and Commerce and Industry Districts	52
3.3 WAGES AND PROPRIETORS' INCOME, BUSINESS REVENUES, CITY REVENUES AND EXPENDITURES	54
3.3.1 WAGES AND PROPRIETORS' INCOME	54
3.3.1.1 California Employment Development Department Data	54
3.3.1.2 Bureau of Economic Analysis Data	60
3.3.2 BUSINESS REVENUES	66
3.3.2.1 Manufacturing Revenues	66
3.3.2.2 Service Industry Revenue	69
3.3.2.3 Wholesale Trade Revenues	72
3.3.2.4 Retail Trade Revenues	73
3.3.2.5 Taxable Sales	75
3.3.3 CITY REVENUES AND EXPENDITURES	77
3.3.3.1 City Revenues	77
3.3.3.2 City Expenditures	79
3.4 BUILDING AND LAND USE	81
3.4.1 BUILDING PERMIT APPLICATIONS: 1990	81
3.4.1.1 Number and Construction Cost of Building Permits by Districts	81
3.4.1.2 Land Use Activities Reflected in Building Permit Applications	84
3.4.1.3 Average Construction Cost	84
3.4.1.4 Application Status	86
3.4.2 LAND USE AND ZONING	91
3.4.2.1 Zoning	91
3.4.2.2 Land Use	93

LIST OF TABLES

Table 1.2.1	Land Use Activity Classification	4
Table 2.1.1	Bay Area Population, Labor Force, and Employment	11
Table 2.1.2	Bay Area Population, Labor Force, and Employment Percentage Change ..	12
Table 2.1.3	Bay Area Population, Labor Force, and Employment Percentage Distribution by Sub-Region	13
Table 2.2.1	Bay Area Employment by Industry Groups 1975-90	17
Table 2.2.2	Bay Area Employment by Industry Groups and Sub-Regions	18
Table 2.2.3	Bay Area Employment by Industry and Sub-Regions Percentage Change 1975-1990	20
Table 2.2.4	Bay Area Employment by Industry Groups and Sub-Regions: Percentage Distribution by Sub-Regions 1975-90	24
Table 3.1.1	Employment by Land Use Activities, Annual Average 1976-1990	27
Table 3.1.2	Employment Percentage Distribution by C&I District and Land Use Activity 1987	33
Table 3.1.3	Employment by C&I District and Establishment Size Class: Percentage Distribution by Size Class 1987	37
Table 3.2.1	Establishments by C&I Districts and Land Use Activities, 1987	41
Table 3.2.2	Office Establishments by C&I Districts and Main Industry Groups, 1987	46
Table 3.2.3	Retail Establishments by C&I Districts and Main Industry Groups, 1987	47
Table 3.2.4	Industrial Establishments by C&I Districts and Main Industry Groups, 1987	48
Table 3.2.5	Cultural/Institutional Establishments by C&I Districts and Main Industry Groups, 1987	49
Table 3.2.6	Establishments by Zip Code and Land Use Activity 1987	50
Table 3.2.7	Establishment Percentage by Zip Code and Land Use Activity 1987	51
Table 3.2.8	Establishments by C&I Districts and Size Class 1987	53
Table 3.3.1	Unadjusted Wages by Land Use Activities, 1976-1990	55
Table 3.3.2	Adjusted Wages by Land Use Activities Annual Wages Adjusted by Inflation, 1976-1990	55
Table 3.3.3	Wages by Land Use Activities: Percentage Distribution, 1976-1990	57
Table 3.3.4	Wages by Land Use Activities: Percentage Change Of Annual Wages Adjusted by Inflation, 1976-1990	57
Table 3.3.5	Personal Income by Place of Work by Earning Type, 1981-1989	61
Table 3.3.6	Personal Income by Place Of Work by Industry Group, 1981-1989	62
Table 3.3.7	Personal Income by Place Of Work by Industry Group, Adjusted by Inflation, 1981-1989	62
Table 3.3.8	Personal Income by Place Of Work by Industry Group: Percentage Distribution by Industry Group 1981-1990	64
Table 3.3.9	Personal Income by Place Of Work by Industry Group Percentage Change Of Earnings Adjusted by Inflation, 1981-1989	64
Table 3.3.10	Manufactures, Payroll Employer Statistics 1982	67
Table 3.3.11	Manufactures, Payroll Employer Statistics 1987	68
Table 3.3.12	Service Industries, Payroll Employer Statistics 1982	69
Table 3.3.13	Service Industries, Payroll Employer Statistics 1987	70
Table 3.3.14	Service Industries, Non Employer Statistics 1987	71
Table 3.3.15	Wholesale Trade, Payroll Employer Statistics 1982	72

Table 3.3.16	Wholesale Trade, Payroll Employer Statistics 1987	72
Table 3.3.17	Retail, Payroll Employer Statistics 1982	73
Table 3.3.18	Retail, Payroll Employer Statistics 1987	74
Table 3.3.19	Taxable Sales and Sales Tax Permits by Type Of Business, 1990	76
Table 3.3.20	General Revenues by Source, Constant Dollar Value, 1981-1990	78
Table 3.3.21	General Revenues by Source, 1981-1990 (Unadjusted)	78
Table 3.3.22	General Governmental Expenditures by Function, Constant Dollar Value, 1981-1990	80
Table 3.3.23	General Governmental Expenditures by Function 1981-1990 (Unadjusted) ..	80
Table 3.4.1	Building Applications by C&I District and Land Use Activities 1990	82
Table 3.4.2	Construction Cost Of Building Applications by C&I District and Land Use Activities, 1990	83
Table 3.4.3	Average Construction Cost by Building Applications by C&I District, 1990 ..	85
Table 3.4.4	Building Applications by Application Disposition and Land Use Activity, 1990	87
Table 3.4.5	Construction Cost Of Building Applications by Application Disposition and Land Use Activity, 1990	88
Table 3.4.6	Building Applications by C&I District and Application Status 1990	89
Table 3.4.7	Construction Cost Of Building Applications by C&I District and Status, 1990	90
Table 3.4.8	Zoning by C&I Districts (Acres) 1989	92
Table 3.4.9	Land Use Citywide (Acres) 1970	94
Table 3.4.10	Area by Land Use Activity and Study Area (Square Feet) 1987-1991	95
Table 3.4.11	Number Of Lots by Land Use Activity and Study Area 1987-1991	95

LIST OF GRAPHS

Graph 2.1.1	San Francisco Population and Employment 1950-1990	10
Graph 2.1.2	Regional Distribution Of Employment, Labor Force, and Population	14
Graph 2.2.1	Bay Area Employment by Sub-Regions 1990	23
Graph 3.1.1	Employment by Land Use Activities, Annual Average 1976-1990	28
Graph 3.1.2	Employment by Land Use Activities, Percentage Change 1976-1990	29
Graph 3.1.2	Office Employment by Industry Group	30
Graph 3.1.3	Retail Employment by Industry Group	31
Graph 3.1.4	Government Employment by Industry Group	31
Graph 3.1.5	Industrial: Manufacturing Employment by Industry Group	32
Graph 3.1.6	Industrial: Other Employment by Industry Group	32
Graph 3.1.7	Employment Distribution by C&I Districts, 1987	36
Graph 3.1.8	Employment Distribution by C&I Districts by Establishment Size Class	38
Graph 3.3.1	Wages by Land Use Activities Adjusted by CPI	56
Graph 3.3.2	Wages by Land Use Activities: Percentage Distribution	58
Graph 3.3.3	Wages: Percentage Change Adjusted by Inflation	58
Graph 3.3.4	Percentage Change Of Annual Wages Adjusted by Inflation	59
Graph 3.3.5	Personal Earnings Adjusted by Inflation	63
Graph 3.3.6	Personal Earnings by Industry	65

LIST OF MAPS

Map 1.1	Commerce and Industry Districts	7
Map 2.1	Bay Area: Counties and Subregions	9
Maps 3.1.1	Employment Distribution by C&I Districts	34
Maps 3.2.1	Establishments Distribution by C&I Districts	42

SOURCES:

Bureau of Building Inspection
County Business Patterns
Employment Development Department
San Francisco Department of City Planning
San Francisco Office of the Controller
Standard Industrial Classification Manual
US Department of Commerce
US Department of Commerce, Bureau of Economic Analysis
US Department of Commerce, Bureau of Census

1.0 INTRODUCTION

The San Francisco Commerce and Industry Inventory is a compilation of information that can be used to describe the city's economic activities. The data included are about employment, establishments, transactions such as revenues and expenditures of businesses and government, and land use and building permits. This inventory summarizes existing data collected by various public and private agencies within a consistent format that allows for comparisons and cross-references. This first inventory sets up the basis for a series of annual inventories which will refine data formats and eliminate inconsistencies by processing more detailed data, similar to the widely used Housing Inventory Series.

The data presented in this document provide a basic framework for economic analysis and policy formulation. While the immediate goal is to make local economic data available to the Department and other public and private agencies, the long term goals are to provide a consistent format within which data can be compared over time, and to layout the preliminary information for updating the Commerce and Industry Element of the Master Plan.

The Inventory is organized into four sections: **1.0 Introduction; 2.0 Regional Overview, and 3.0 San Francisco Economic Indicators**. The *Introduction* explains how the various sections of the inventory are organized, describes the methodology, and defines the data formats that are used throughout the document.

The second section, **Regional Overview**, presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, and employment indicators of the Bay Area for the last twenty years.

The third section, **San Francisco Economic Indicators** is the main body of the inventory. This section summarizes data from various agencies which are organized in four sections by employment, establishments, transactions, and land and building uses.

To make the information useful for different purposes, it has been arranged as follows. Much of the presentation is driven

by the format of the data that is available. The employment data, for example, describe city-wide trends by Land Use Activities from 1976 to the present, but distribution by district for the most important industries in San Francisco is only available for 1987.

Establishments data, also presented by Land Use Activities, focus on the distribution of business establishments by specific industries, by geographical areas, and by establishment size for 1987. Each Land Use Activity is subdivided by industry groups to the two-digit SIC level. Commerce and Industry districts and zip code are the two geographical units used to describe the distribution of establishments. According to the number of employees, establishments are also classified by size.

Transactions information include data related to wages, proprietors' income, business revenues, and city revenues and expenditures. While employment and establishments measure the city's economic activity in terms of number of people and businesses, transactions provide indicators to measure the size of the city's economy in monetary terms. Wages and proprietors income figures are presented by Land Use Activities and by industry groups (SIC), describing changes over last decade. Business revenue data cover some main industries for 1982 and 1987. Data about city revenues and expenditures are presented for the 1980s.

Land and building uses provide a spatial measure of the size and location of economic activities. The land use section includes commercial, industrial, and residential zoning information for the entire city and current land use information for portions of the city. Building uses summarize building permit applications for new buildings and alterations in 1990. These data are organized by uses, status of application, and distribution by commerce and industry districts.

1.1 Data formats

The data presented for the indicators mentioned above are described over time and in terms of size, type of activity, and geographical distribution. Depending upon available data and the need to show specific trends, the period of time covered ranges from a single year to the past two decades. The magnitude of the different indicators is measured by their own specific units such as employees, establishments, dollars, permits, etc.

For the type of activity and geographical distribution of those activities, the Commerce and Industry inventory sets specific data formats to provide a consistent framework for comparisons and cross-references among indicators. The data gathered from different sources in different formats are aggregated by predefined Land Use Activity classification and Commerce and Industry Districts. However, some of the data remain in their original formats because of limited detail; for example if the data are not disaggregated to two-SIC digits, they are presented in their original SIC format.

SIC refers to the Standard Industrial Classifications established by the U.S. Census Bureau to categorize all industries and economic activities. This classification system categorizes business establishments according to the kind of product or service they provide. The SIC system is hierarchical. The first digit indicates the broadest categorizations, the first two digits major industry groups within those broad categories, the first three digits industry groups, and the first four digits industries. This inventory generally uses two and three digit SIC codes.

The **LAND USE ACTIVITY** classification is derived from the Standard Industrial Classification (SIC) and space use categories, by dividing all industry groups and space categories into six main activities based on the use of the land or space that the industry occupies. The Land Use Activity classification enables the translation of economic information for use in land use policy development. It matches the type of economic activity with the type of building structure and the land use pattern. This classification allows evaluations of employment, establishments, and transactions within their physical environment. Since this classification has been built based on San Francisco activities and land use patterns, its application to any environment outside of the city may require some adjustments. For example, San Francisco mining activities are characterized as Office, which is not the case in other counties.

The activities defined within this classification are **Office, Retail, Industrial, Hotel, Cultural/Institutional**, and government. Each of these activities has a defined type of space and a set of industry groups, as specified in the table below (Land Use Activities classification). The space use, as indicated in the table, describes the characteristics of the building structure and its use. Industry groups included belong to the SIC described by 1 to 3 digit codes.

Office activity includes mainly professional services such as architecture, engineering, real estate, computer services, research and development activities and government administrative functions. There are three types of space consid-

LAND USE ACTIVITY <i>Space Use</i>	EMPLOYMENT INDUSTRY GROUPS	CODE
OFFICE ACTIVITY <i>Examples: Headquarters offices, professional services, branch bank.</i>	Agriculture & mining Transportation services F.I.R.E Business services Physician & dentist office Legal services Engineering & architecture Management Accounting, research, & other serv. Public administration	0,1 47 6 73 801-4 81 871 874 872-3,89 9
RETAIL ACTIVITY <i>Examples: Stores, restaurants, bars, commercial parking lots.</i>	Department stores Food stores Apparel & accessory stores Eating & drinking places Other retail stores Personal services Auto repair and services Automobile parking Miscellaneous repair services	53 54 56 58 52,5,7,9 72 751,3,4 752 76
INDUSTRIAL ACTIVITY <i>Examples: Warehouses, factories, workshops, showrooms, port facilities.</i>	Food manufacturing Apparel manufacturing Printing & publishing Electronic manufacturing Other manufacturing Durable goods wholesale Non durable goods wholesale Construction Transportation Communication Other public utilities	20 23 27 36 30-5, 37-9 50 51 15-17 40-2,44-5 48 43,46,49
HOTEL ACTIVITY <i>Examples: hotels, motels, B&Bs.</i>	Hotel	70
CULTURAL/ INSTITUTIONAL ACTIVITY <i>Examples: Hospitals, libraries, schools, theaters, churches, museums, nightclubs.</i>	Health services Educational services Social services Museums Membership organizations Amusement & recreation Motion picture	805-09 82 83 84 86 79 78
GOVERNMENT ACTIVITY <i>Can include Office, Industrial, Cultural/Institutional spaces.</i>	Federal State Local	

Table 1.2.1

**LAND USE
ACTIVITY
CLASSIFICATION**

Sources:

Department of City Planning
Standard Industrial Classification

ered: primary offices which mainly include headquarters and large firms in high density buildings; secondary offices which include small professional offices and services; including walk-in customer banking facilities. In some cases office space and activity are difficult to identify and isolate from other types of space and activities because many offices have been created by remodelling warehouses or other industrial buildings or even residential space, or they are accessory to other activities.

Retail activity includes large and small scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, auto repair shops, beauty shops, etc. Activity and space use are better correlated for Retail activity than for Office activity.

The **Industrial** category covers activities related to processing of goods and provision of city-wide infrastructure. It includes manufacturing, wholesale, construction, transportation, communication, and public utilities. Most of these activities take place in large buildings and structures that can house machinery and industrial equipment. However, some of the food manufacturing and printing activities are located in small shops due to the small scale of production and machinery required.

Hotel activity is defined as a separate Land Use Activity because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, bed and breakfast.

Cultural/Institutional activities cover the social spectrum of the economy by including health and educational services as well as entertainment and artistic activities. This category covers the widest variety of space type which varies from large establishments (hospitals, schools, museums, etc.) to small studios or businesses (nightclubs, art studios, etc.).

Government activity combines Office, Industrial, and Cultural/Institutional activities developed as public services and government administration. This category is not characterized by specific activity, space, or land use pattern but is defined as a separate category because several data sources classify government as a separate employment or establishment

category to facilitate standard economic analysis.

Residential activity is an additional category that is only considered when describing land or building uses. It does not correspond to any employment, business, or transaction classification.

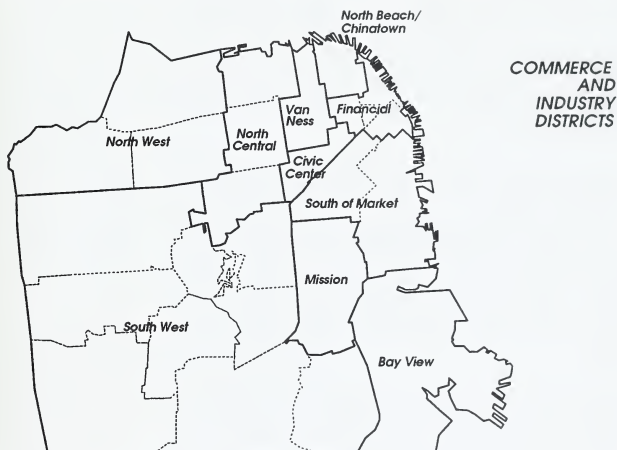
The **COMMERCE AND INDUSTRY (C&I) DISTRICTS** are characterized by predominant economic activities, employment concentration, business density, and spatial characteristics. Each district is defined by one or more zip codes, because zip code is usually the smallest geographical unit for which economic data are available. The district boundaries were also established to be as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to economic data. The C&I districts are shown on the map below.

Districts in the East side of the city are defined by their specialization in one type of Land Use Activity or similar neighborhood commercial activities, such as Mission, North Beach/Chinatown District, Bay View, South of Market, Civic Center and North Central Districts.

Districts in the north and east areas of the city, where establishments are very concentrated, are usually small, such as the Financial, or Van Ness Districts. In the west side of the city, where economic activities are relatively dispersed and the predominant land use is residential, districts tend to be larger.

In this first inventory, it was not possible to present all data by Land Use Activity and C&I district. As data sources and collection improve, it is intended to consistently use this framework in the C&I annual series for purposes of comparison and trend analysis.

MAP 1.1



2.0 REGIONAL OVERVIEW

San Francisco plays an important role as an urban center with diverse linkages to the regional, state, and national economies. Because of this role, some historical and regional references have been included in the inventory for a better understanding of current San Francisco trends. This section looks at the Bay Area population, labor force and employment and the distribution of regional employment by industry groups, since 1970.

According to the US Department of Commerce, which is the source for this data, **labor force** includes employed persons, unemployed persons, and members of the armed forces. Unemployment is defined as "...civilians 16 years old and over not at work who were actively looking for work during the last four weeks and were available to accept a job or who were waiting to be called back to a job from which they have been laid off. Labor force data are collected by place of residence; a member of the labor force who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed.

Employment includes "civilians 16 years old and over who were either: at work..., or temporarily absent from work due to illness, vacation, strike, or other personal reasons." Employment data are collected by place of employment. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives.

The regional data included in this section has been summarized by four subregions: North Bay, East Bay, South Bay, and San Francisco. These subregions group the nine counties in the Bay Area based on their geographic location and commute patterns. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties. San Francisco is defined by its county boundaries.



2.1 EMPLOYMENT, POPULATION, AND LABOR FORCE WITHIN THE BAY AREA

San Francisco has a very diverse employment base which is generated from a regional labor force. During the last half of the century we have observed an increasing employment in the city which has almost double, while the resident population has decreased by seven percent.



Graph 2.1.1

This convergence of employment and population illustrates the increasing regional participation in the city's employment base.

NOTE : The sharp rise in employment between 1970 and 1975 is partially explained by the inclusion of the self-employed and other government employment data since 1972 by the Department of Human Resource Development which is the source for this information.

The following tables, 2.1.1, 2.1.2, and 2.1.3, show the regional distribution of population, labor force and employment in 1970, 1980, and 1990. These tables illustrate the large size of San Francisco employment in relation to its local labor force and population. They also show a comparison between San Francisco and the North Bay, East Bay, and South Bay. These three areas represent the labor force base for San Francisco and the region, and also define the three commute corridors into San Francisco.

When looking at the following tables it should be considered that, the Bay Area covers 7,041 square miles from which the North Bay represents 53 percent, the East Bay 21 percent, the South Bay 25 percent, and San Francisco less than 1 percent.

Table 2.1.1 BAY AREA POPULATION, LABOR FORCE, AND EMPLOYMENT

POPULATION	1970	1980	1990
North Bay	660,004	860,668	1,059,700
East Bay	1,623,573	1,761,759	2,072,300
South Bay	1,620,948	1,887,029	2,141,700
San Francisco	715,674	678,974	723,959
TOTAL	4,620,199	5,188,430	5,997,659
LABOR FORCE			
	1970	1980	1990
North Bay	262,621	421,445	525,300
East Bay	689,331	886,769	1,106,700
South Bay	692,719	1,023,630	1,169,000
San Francisco	351,169	370,408	394,200
TOTAL	1,995,840	2,702,252	3,195,200
EMPLOYMENT			
	1970	1980	1990
North Bay	104,578	274,800	379,563
East Bay	389,128	691,300	883,846
South Bay	447,781	936,700	1,159,496
San Francisco	377,142	553,600	582,287
TOTAL	1,318,629	2,456,400	3,005,192

Source: Department of City Planning
US Department of Commerce

As shown in Table 2.1.2, population, labor force, and employment all increased between 1970 and 1990, and each of these variables increased in each decade in each subregion, except for a five percent decrease in San Francisco's population during the 1970s. In 1990, the total Bay Area population increased by 30 percent over 1970, reaching almost 6 million people; total employment increased by 128 percent, reaching about 3 million jobs, or about half the population size. San Francisco's population increased by only one percent (about 8,300 people), its labor force increased by 12 percent (about 43,000 people), while the number of jobs increased by 54 percent (about 205,000 jobs).

The proportion of the labor force which is unemployed or in the military is relatively small, and relatively stable over time compared to the total amount of employment. Consequently, examining the distribution of labor force and employment throughout the region, and how this distribution changes over

time, is an indication of the spatial organization of the region's economy. (However, subtracting labor force from employment is not an accurate measure of commuters, since some residents commute out of the city for jobs, and some members of the labor force are unemployed or in the military.)

San Francisco is the only subregion which has historically had (and has currently) more jobs than the resident labor force, indicating that people commute into San Francisco, and that economic activity is concentrated in San Francisco. The other three subregions have larger resident labor forces than the number of jobs. The growth in regional employment (128 percent) was greater than the growth in labor force (60 percent). When employment grows faster than labor force (other factors remaining the same) it indicates that workers are coming in from outside the region.

BAY AREA POPULATION, LABOR FORCE, AND EMPLOYMENT
Percentage Change

POPULATION	1970-80	1980-90	1970-90
North Bay	30	23	61
East Bay	9	18	28
South Bay	16	14	32
San Francisco	-5	7	1
TOTAL	12	16	30
LABOR FORCE	1970-80	1980-90	1970-90
North Bay	60	25	100
East Bay	29	25	61
South Bay	48	14	69
San Francisco	5	6	12
TOTAL	35	18	60
EMPLOYMENT	1970-80	1980-90	1970-90
North Bay	163	38	263
East Bay	78	28	127
South Bay	109	24	159
San Francisco	47	5	54
TOTAL	86	22	128

Table 2.1.2

During the 1970s, Bay Area employment and labor force have grown faster than during the 1980s. Labor force increased 35 percent in the 70s and 18 percent in the 80s. Employment increased 86 percent in the 70s and 22 percent in the 80s.

Source: Department of City Planning
US Department of Commerce

Table 2.1.3 shows the percentage share of each of these three variables held by each of the subregions. San Francisco's share of the region's population has declined from 15 percent to 12 percent; the North Bay's share has increased from 14 percent to 18 percent; the other subregions have remained about the same. Similarly, San Francisco's share of the region's labor force has declined from 18 percent to 12 percent; the North Bay's share has increased from 13 percent to 16 percent; the other subregions have remained about the same. There has been a steady decentralization of jobs in relation to San Francisco. In 1970, 29 percent of the region's jobs were in San Francisco; in 1990 this had declined to 19 percent of the region's jobs. This loss of share was picked up by the North Bay, which share went from 8 percent to 13 percent; and the South Bay, which share went from 34 percent to 39 percent of the region's jobs.

Table 2.1.3 BAY AREA POPULATION, LABOR FORCE AND EMPLOYMENT
Percentage distribution by sub-region

POPULATION	1970	1980	1990
North Bay	14	17	18
East Bay	35	34	35
South Bay	35	36	36
San Francisco	15	13	12
TOTAL	100	100	100
LABOR FORCE	1970	1980	1990
North Bay	13	16	16
East Bay	35	33	35
South Bay	35	38	37
San Francisco	18	14	12
TOTAL	100	100	100
EMPLOYMENT	1970	1980	1990
North Bay	8	11	13
East Bay	30	28	29
South Bay	34	38	39
San Francisco	29	23	19
TOTAL	100	100	100

Source: Department of City Planning
US Department of Commerce

BAY AREA EMPLOYMENT

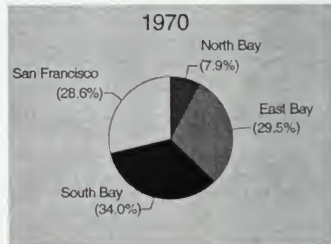
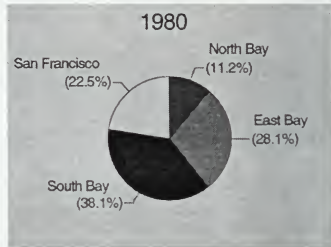
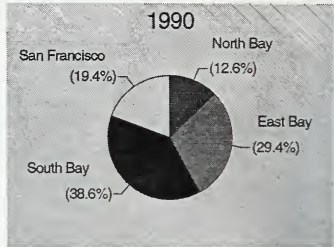
Graph 2.1.2

Regional Distribution of Employment, Labor Force, and Population.

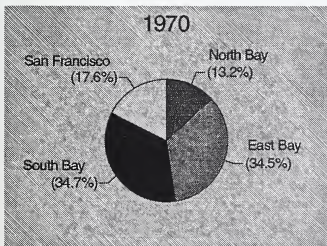
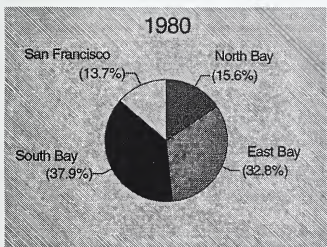
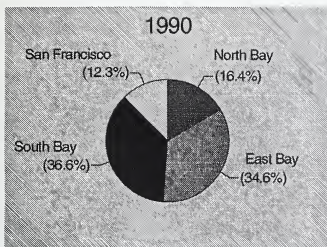
From 1970 to 1990, San Francisco's share of regional population, labor force, and employment have decreased.

The North and South Bay have increased their regional shares.

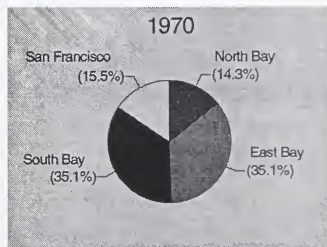
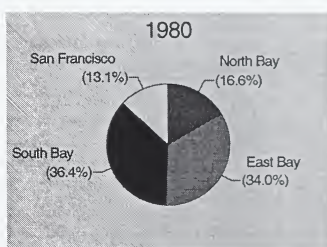
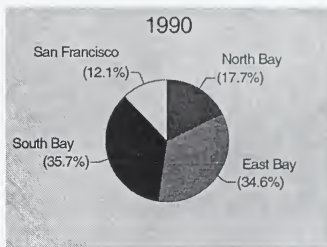
The East Bay employment, labor force and population shares have remained the same over the two decades.



BAY AREA LABOR FORCE



BAY AREA POPULATION



2.2 REGIONAL EMPLOYMENT BY INDUSTRY GROUPS

The tables included in this section are based on Employment Development Department (EDD) data, covering the period from 1975 to 1990, for every five years. The employment data are classified by SIC groups at the one digit level. These data are presented, first, for the total Bay Area region by industry groups, and then each industry group is disaggregated into the four sub-regions: North Bay, East Bay, South Bay, and San Francisco. The tables presented in this section are organized as follows: first, absolute number of employees; second, percentage distribution by industry groups or sub-region; and third, the percentage change for every five year period.

Looking at the Bay Area total employment, from 1975 to 1990, we see a significant growth of more than fifty percent, reaching more than three million employees in 1990. The increase from 1975 to 1980 was 484,000 employees while the total increase from 1975 to 1990 was over one million employees.

From 1975 to 1990, employment in services showed the largest absolute increase of 430,000 employees and the largest percentage change of 107 percent while mining and agriculture showed the smallest increase of 500 employees which correspond to less than 2 percent. Retail, manufacturing and F.I.R.E. show the second largest growth with 200,000, 136,000 and 76,000, respectively. In terms of percentage change from 1975 to 1990, the construction industry showed the second largest percentage growth after services (89 percent). Retail, F.I.R.E. and wholesale trade have also shown a significant growth of 66, 57 and 55 percent respectively.

Currently, one-third of employment is in services, followed by retail, manufacturing and government. Service employment's share increased seven percentage points while government declined by six percentage points since 1975. The shares of manufacturing and retail have remained more or less the same over the period.

In terms of employment distribution by industry groups and sub-regions during 1990, F.I.R.E. was the industry with the largest percentage (36) of its employment located in San Francisco. With a smaller percentage, San Francisco has also a significant regional participation in communication and utilities, and service employment, with 27 and 24 percent respectively. The South Bay has increased its share of

Table 2.2.1

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS
(Thousands of jobs)
1975-90

INDUSTRY	1975	1980	1985	1990
SERVICES:	402	547	667	832
RETAIL:	301	391	453	501
MANUFACTURING:	357	476	493	492
F.I.R.E.:	136	183	203	213
CONSTRUCTION:	78	105	126	147
WHOLESALE TRADE:	113	138	158	175
GOVERNMENT:	412	426	426	458
TRANSPORTATION:	87	93	98	105
COMMUNICATION/UTILITIES:	59	68	75	69
MINING/AGRICULTURE:	26	28	26	27
	1972	2456	2717	3074

In 1990, almost a third of the total employment was concentrated in services. It went from 20 percent of total employment in 1975 to 27 percent in 1990. Government employment lost its share within the region, going from 21 percent of total employment in 1975 to 15 percent in 1990. Retail and manufacturing were the following largest sectors with about 15 percent each and no significant change within the 15 year period. The smallest sectors were mining, agricultural, communication, and utilities, representing together about 3.1 percent of the total employment, which is a decline from a 4.3 percent share in 1975.

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS
Percentage distribution by industry groups
-1975-90

INDUSTRY	1975	1980	1985	1990
SERVICES:	20	22	25	27
RETAIL:	15	16	17	16
MANUFACTURING:	18	19	18	16
F.I.R.E.:	7	7	7	7
CONSTRUCTION:	4	4	5	5
WHOLESALE TRADE:	6	6	6	6
GOVERNMENT:	21	17	16	15
TRANSPORTATION:	4	4	4	3
COMMUNICATION/UTILITIES	3	3	3	2
MINING/AGRICULTURE:	1	1	1	1
	100	100	100	100

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS
Percentage Change
-1975-90

INDUSTRY	-1975-80	-1980-85	-1985-90	-1975-90
SERVICES:	36	22	25	107
RETAIL:	30	16	11	66
MANUFACTURING:	33	4	-0	38
F.I.R.E.:	34	11	5	57
CONSTRUCTION:	36	20	16	89
WHOLESALE TRADE:	22	15	11	55
GOVERNMENT:	3	-0	7	11
TRANSPORTATION:	7	5	7	21
COMMUNICATION/UTILITIES:	15	10	-7	18
MINING/AGRICULTURE:	8	-9	4	2
	25	11	13	56

Source: Department of City Planning
Employment Development Department

BAY AREA EMPLOYMENT BY INDUSTRY GROUPS AND SUB-REGIONS
(Thousands of jobs)
1975-90

Table 2.2.2

CATEGORY/ Sub-region	1975	1980	1985	1990
SERVICES:				
North Bay	40	58	74	101
East Bay	103	136	172	226
South Bay	137	200	250	303
San Francisco	123	154	171	203
Regional Total	402	547	667	832
RETAIL:				
North Bay	39	56	68	84
East Bay	100	128	149	168
South Bay	108	139	161	170
San Francisco	55	69	75	79
Regional Total	301	391	453	501
MANUFACTURING:				
North Bay	20	30	35	40
East Bay	103	111	103	113
South Bay	186	285	312	299
San Francisco	47	51	43	40
Regional Total	357	476	493	492
F.I.R.E.:				
North Bay	10	17	21	24
East Bay	28	37	47	58
South Bay	30	43	51	55
San Francisco	68	86	84	77
Regional Total	136	183	203	213
CONSTRUCTION:				
North Bay	11	15	20	29
East Bay	29	37	45	52
South Bay	27	40	47	50
San Francisco	11	13	14	16
Regional Total	78	105	126	147

From 1975 to 1990, San Francisco's largest employment groups are service and government industries, key sectors contributing to its role as a regional center. In 1990 retail became the third largest employment group for San Francisco, replacing F.I.R.E. which until 1985 was the third largest.

The South Bay has had for the past fifteen years a significant manufacturing and service employment.

For the same period the East Bay has shown significant increases in services and government employment.

(continue next page)

(continue from previous page)

CATEGORY/ Sub-region	1975	1980	1985	1990
WHOLESALE TRADE:				
North Bay	6	9	12	16
East Bay	33	38	45	52
South Bay	36	54	65	78
San Francisco	38	38	35	30
Regional Total	113	138	158	175
GOVERNMENT:				
North Bay	67	69	71	76
East Bay	150	154	154	168
South Bay	108	114	112	122
San Francisco	89	89	89	93
Regional Total	412	426	426	458
TRANSPORTATION:				
North Bay	4	5	6	7
East Bay	24	27	28	32
South Bay	33	37	43	46
San Francisco	27	25	22	21
Regional Total	87	93	98	105
COMMUNICATION AND UTILITIES:				
North Bay	5	7	7	7
East Bay	15	16	23	30
South Bay	15	17	18	14
San Francisco	24	28	27	19
Regional Total	59	68	75	69
MINING AND AGRICULTURE:				
Regional Total	26	28	26	27
TOTAL JOBS:				
North Bay	213	275	324	396
East Bay	589	690	771	904
South Bay	688	937	1061	1197
San Francisco	482	554	562	577
Regional Total	1972	2456	2717	3074

Source: Department of City Planning
Employment Development Department

BAY AREA EMPLOYMENT BY INDUSTRY AND SUB-REGIONS
Percentage Change
1975-90

Table 2.2.3

CATEGORY/ Sub-region	1975-80	1980-85	1985-90	1975-90
SERVICES:				
North Bay	44	28	38	155
East Bay	32	26	31	119
South Bay	46	25	21	122
San Francisco	25	12	18	65
Regional Total	36	22	25	107
RETAIL:				
North Bay	42	22	24	113
East Bay	28	17	13	69
South Bay	29	16	5	58
San Francisco	25	9	6	45
Regional Total	30	16	11	66
MANUFACTURING:				
North Bay	49	17	13	96
East Bay	7	-7	10	10
South Bay	53	10	-4	60
San Francisco	7	-16	-6	-15
Regional Total	33	4	-0	38
F.I.R.E.:				
North Bay	62	27	13	132
East Bay	33	26	24	108
South Bay	47	18	7	86
San Francisco	25	-2	-9	12
Regional Total	34	11	5	57
CONSTRUCTION:				
North Bay	41	32	46	171
East Bay	30	21	15	82
South Bay	47	17	6	84
San Francisco	17	8	12	42
Regional Total	36	20	16	89

In terms of employment growth from 1975 to 1990, the North Bay has shown the greatest percentage increase in number of jobs in all sectors except communication and utilities, for the 1975-1990 period. During this same period San Francisco has shown the smallest increase in all sectors.

For the 1980-85 period, the East Bay has had a growth pattern opposite those of the other sub-regions. While the East Bay increased its rates of growth within wholesale trade and communication and utilities, the other three sub-regions showed a decline in the same industries. Similarly, while the East Bay showed a sharp decline in transportation for the same 1980-85 period, the North Bay and the South Bay showed a large percentage increase.

From 1975 to 1990, the service sector shows the highest regional percentage increase among all industry groups. This increase was most rapid in the late 70s (36 percent). The slowest, but still substantial, growth took place in the early 80s (22 percent). Slower employment growth for most industries occurred in the 1980-85 period.

(continue next page)

(continue from previous page)

CATEGORY/ Sub-region	1975-80	1980-85	1985-90	1975-90
WHOLESALE TRADE:				
North Bay	42	39	28	152
East Bay	14	20	14	55
South Bay	50	21	20	118
San Francisco	-1	-6	-14	-21
Regional Total	22	15	11	55
GOVERNMENT:				
North Bay	3	3	8	14
East Bay	3	0	9	12
South Bay	6	-1	8	13
San Francisco	1	-1	5	5
Regional Total	3	-0	7	11
TRANSPORTATION:				
North Bay	21	32	19	90
East Bay	14	3	14	34
South Bay	13	17	7	40
San Francisco	-7	-13	-5	-24
Regional Total	7	5	7	21
COMMUNICATION AND UTILITIES:				
North Bay	48	-6	4	46
East Bay	9	40	30	98
South Bay	10	10	-21	-5
San Francisco	16	-3	-31	-22
Regional Total	15	10	-7	18
MINING AND AGRICULTURE:				
Regional Total	8	-9	4	2
TOTAL JOBS:				
North Bay	29	18	22	86
East Bay	17	12	17	53
South Bay	36	13	13	74
San Francisco	15	2	3	20
Regional Total	25	11	13	56

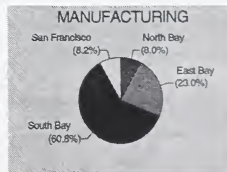
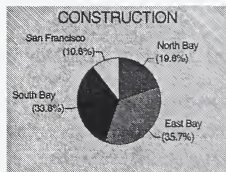
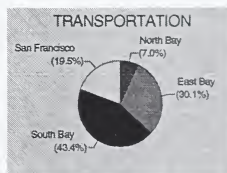
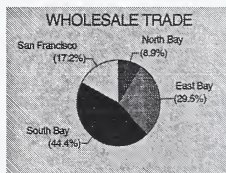
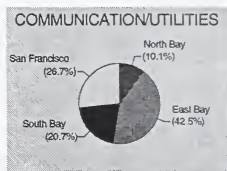
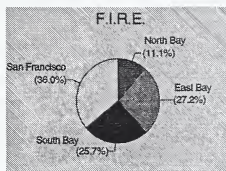
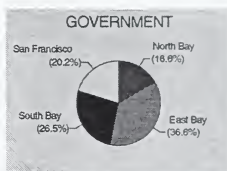
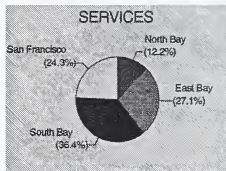
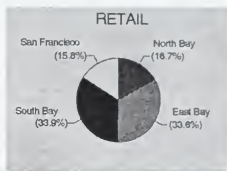
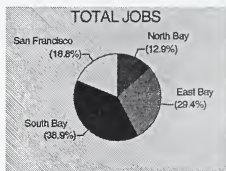
Source: Department of City Planning
Employment Development Department

total manufacturing employment from 52 percent in 1975 to 61 percent in 1990 while San Francisco and the East Bay shares declined by 5 percent each. The most significant regional participation of the South Bay has been within manufacturing with 61 percent, wholesale trade with 44 percent, and transportation with 43 percent. The East Bay shows its greatest regional employment shares within communication and utilities with 43 percent, followed by government and construction with 37 and 36 percent. The North Bay major regional shares are in construction with 20 percent, retail and government, each one with 17 percent.

Although San Francisco still has the greatest concentration of F.I.R.E. jobs; its share of this sector has declined from 50 percent of the regional total of F.I.R.E. jobs in 1975 to 36 percent in 1990. A similar pattern is seen in the service sector where San Francisco has a significant participation, but where it has lost about 6 percent share, leading to an increase of 2 percent for each of the other three subregions. During the past fifteen years, the greatest losses in regional share for San Francisco besides the F.I.R.E. sector, have been within wholesale trade, communication and utilities, and transportation. The city's regional share in these sectors have declined by 16, 14, and 10 percent.

Graph 2.2.1

BAY AREA - EMPLOYMENT BY SUB- REGIONS 1990



BAY AREA EMPLOYMENT BY INDUSTRY GROUPS AND SUB-REGIONS
 Percentage distribution by sub-regions
 1975-90

Table 2.2.4

CATEGORY/ Sub-region	1975	1980	1985	1990
SERVICES:				
North Bay	10	11	11	12
East Bay	26	25	26	27
South Bay	34	37	37	36
San Francisco	30	28	26	24
Regional Total	100	100	100	100
RETAIL:				
North Bay	13	14	15	17
East Bay	33	33	33	34
South Bay	36	36	36	34
San Francisco	18	18	17	16
Regional Total	100	100	100	100
MANUFACTURING:				
North Bay	6	6	7	8
East Bay	29	23	21	23
South Bay	52	60	63	61
San Francisco	13	11	9	8
Regional Total	100	100	100	100
F.I.R.E.:				
North Bay	8	9	10	11
East Bay	21	20	23	27
South Bay	22	24	25	26
San Francisco	50	47	41	36
Regional Total	100	100	100	100
CONSTRUCTION:				
North Bay	14	14	16	20
East Bay	37	36	36	36
South Bay	35	38	37	34
San Francisco	14	12	11	11
Regional Total	100	100	100	100

(continue next page)

(continue from previous page)

CATEGORY/ Sub-region	1975	1980	1985	1990
WHOLESALE TRADE:				
North Bay	5	6	8	9
East Bay	29	27	29	29
South Bay	32	39	41	44
San Francisco	34	27	22	17
Regional Total	100	100	100	100
GOVERNMENT:				
North Bay	16	16	17	17
East Bay	36	36	36	37
South Bay	26	27	26	27
San Francisco	21	21	21	20
Regional Total	100	100	100	100
TRANSPORTATION:				
North Bay	4	5	6	7
East Bay	27	29	28	30
South Bay	37	39	44	43
San Francisco	31	27	22	19
Regional Total	100	100	100	100
COMMUNICATION AND UTILITIES:				
North Bay	8	11	9	10
East Bay	25	24	30	43
South Bay	26	25	24	21
San Francisco	41	41	36	27
Regional Total	100	100	100	100
TOTAL JOBS:				
North Bay	11	11	12	13
East Bay	30	28	28	29
South Bay	35	38	39	39
San Francisco	24	23	21	19
Regional Total	100	100	100	100

Source: Department of City Planning
Employment Development Department

3.0 SAN FRANCISCO ECONOMIC INDICATORS

3.1 EMPLOYMENT

The employment information included in this section focuses on the trends between 1976 and 1990 and on employment distribution by Land Use Activity, geography and establishment size. The source of data used to describe employment trends is the Employment Development Department (EDD), an agency that collects and presents county employment data by SIC codes to the two digit level. For the purpose of this Commerce and Industry Inventory, the original data by SIC codes are aggregated into the Land Use Activity classification. SIC codes are used only when necessary to go into more detail. A definition of the Land Use Activity classification and detail on the specific SIC codes grouped into each of the six activities are included in the Introduction, Data formats section, on page 2.

A second set of data, developed by the County Business Patterns (1987), US Department of Commerce, has been used to provide information about employment distribution by geography and by establishment size. The advantage of using these data is the availability of detailed employment groups to four SIC digits and geographical disaggregation by zip code. However, the disadvantage is that the data only include establishments and do not specify employment. Therefore, employment estimates are prepared based on establishment data by size class. The original data by zip code are classified according to the Commerce and Industry Districts which are defined in the Introduction, Data formats section on page 6.

3.1.1 EMPLOYMENT BY LAND USE ACTIVITIES

San Francisco employment between 1976-1990 showed an increase of 180,570 employees, reaching a total of 581,560 employees in 1990. In absolute terms, there are three activities that generated most of the employment growth: Office with 86,000 more employees, Cultural/Institutional with growth of 50,000, and Retail with 30,000, representing together more than 90 percent of the total growth.

Office is the largest activity, accounting for more than one third of the total employment in 1990. From 1976 to 1990, Office activity increased from 27.9 percent to 34.1 percent of the total San Francisco employment. Industrial activity, starting in 1981, declined by almost 10,000 employees, and it went from 35 percent in 1976 to 23 percent of the total employment in 1990. Government employment also showed a decline starting in 1981. Other activities show smaller increases after 1981 than before.

Table 3.1.1

EMPLOYMENT BY LAND USE ACTIVITIES

Annual Average (Thousands of jobs)
1976-1990

LANDUSE	1976	1978	1980	1982	1984	1986	1988	1990
OFFICE	112.01	138.52	159.05	167.56	184.00	187.87	191.23	198.37
RETAIL	60.93	74.53	92.04	80.55	86.93	89.81	90.37	91.28
INDUSTRIAL	140.35	155.19	165.42	162.56	151.02	143.98	136.22	130.69
HOTEL	13.35	14.17	11.62	13.90	15.04	14.94	18.30	18.46
CULTURAL/INST.	54.25	83.60	80.77	89.17	88.91	93.23	97.55	104.72
GOVERNMENT	20.11	42.24	42.94	37.88	36.26	36.96	37.66	38.04
TOTAL	400.99	508.25	551.84	551.62	562.16	566.80	571.53	581.56

EMPLOYMENT BY LAND USE ACTIVITIES

Percentage distribution by Land Use Activities
1976-1990

LANDUSE	1976	1978	1980	1982	1984	1986	1988	1990
OFFICE	27.9	27.3	28.8	30.4	32.7	33.1	33.5	34.1
RETAIL	15.2	14.7	16.7	14.6	15.5	15.8	15.8	15.7
INDUSTRIAL	35.0	30.5	30.0	29.5	26.9	25.4	23.8	22.5
HOTEL	3.3	2.8	2.1	2.5	2.7	2.6	3.2	3.2
CULTURAL/INST.	13.5	16.4	14.6	16.2	15.8	16.4	17.1	18.0
GOVERNMENT	5.0	8.3	7.8	6.9	6.5	6.5	6.6	6.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

EMPLOYMENT BY LAND USE ACTIVITIES

Percentage change
1976-1990

LANDUSE	76-77	78-79	80-81	82-83	84-85	86-87	88-89	76-90
OFFICE	13.56	8.36	4.54	5.54	0.36	-0.07	4.15	77.11
RETAIL	15.00	3.89	2.87	1.53	1.41	0.87	2.61	49.80
INDUSTRIAL	6.65	2.02	1.02	-8.03	-1.92	-3.11	-2.22	-6.88
HOTEL	-0.37	1.92	6.54	-2.55	-2.36	8.18	-6.99	38.29
CULTURAL/INST.	9.64	-2.23	2.23	0.71	3.00	3.42	3.34	93.03
GOVERNMENT	35.13	2.76	-5.08	-5.72	2.71	3.94	3.41	89.18
TOTAL	11.45	3.38	2.16	-0.80	0.41	0.36	1.84	45.03

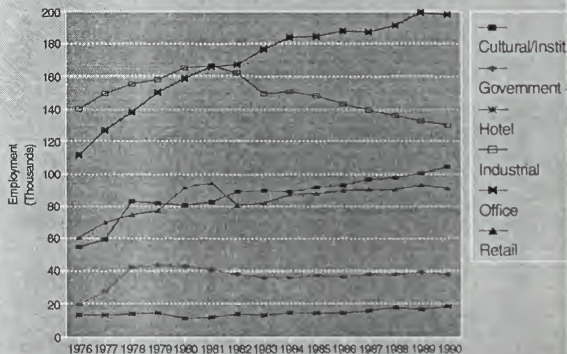
Source: Department of City Planning
Employment Development Department

During the past fourteen years, Retail and Cultural/Institutional activities show an alternate pattern, where one activity grew while the other declined. In 1984 they had almost the same employment size. From 1984 to 1990 Cultural/Institutional employment increased at a faster pace than Retail. By 1990, Cultural/Institutional activities had 104,720 employees, 13,000 more than Retail.

Government and Hotel activities are the smallest of all activities. In 1990, they represented 6.5 and 3.2 percent of the total employment respectively.

The San Francisco average rate of employment growth between 1976 and 1990 has been 2.8 percent per year. During the late 70s it was much higher; from 1976 to 1980 the average growth rate was 8.4 and during the 1980s, the average growth rate was 0.94 percent. Employment declined in 1982, 1983, and 1990.

EMPLOYMENT BY LAND USE ACTIVITIES
Annual Average Employment, 1976-1990



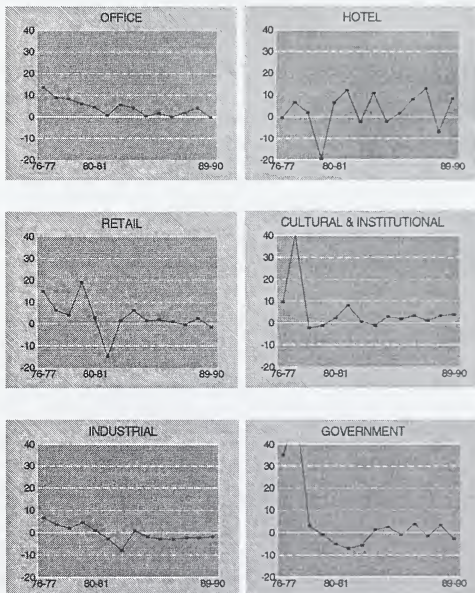
Graph 3.1.1

Graph 3.1.2

EMPLOYMENT BY LAND USE ACTIVITIES

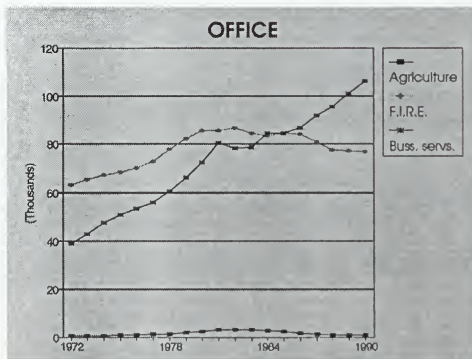
Annual percentage change
1976-1990

Office and Industrial activities show less variations in their rates of change over time than other activities. (The greatest variation among percentage change indicators within Office activity is 4 percent and Industrial Activity is 9 percent.) Retail and Hotel activities have been volatile, with annual percentage change differences up to 25 percent. They show some alternate patterns specially during 1980-84 and 1988-90, where Retail increases while Hotel decreases and vice versa. After 1984, all activities indicate a smaller annual percentage change than in previous years, except for Hotel.



3.1.2 EMPLOYMENT BY INDUSTRY GROUPS: 1972-1990

The following information highlights some employment groups in Office, Retail, Government, and Industrial Activities. The data used come from the EDD annual report. While this is the same source as the previous table the formats are slightly different. The data in the previous table was provided in a form of special report by two SIC digits, including wage information from 1976 to 1990. The data used in these graphs are rounded to hundreds, combined into more than two SIC digits, and begin in 1972. Cultural/Institutional Activities have not been presented in this disaggregated format due to changes in composition of industry groups over this period, which does not allow comparisons over time.



Graph 3.1.2

In 1986, Business Services became the largest employment group within the Office activity. Business services is the industry group which has had an almost continuous employment growth for the past fourteen years. Personnel supply, services to buildings, and computer and data processing are the largest employment groups within business services. Engineering and architectural services have also shown a significant growth. The F.I.R.E. industry group has shown an overall decrease during the 1980s. However, while finance and insurance employment decreased, the real estate sector showed a small increase.

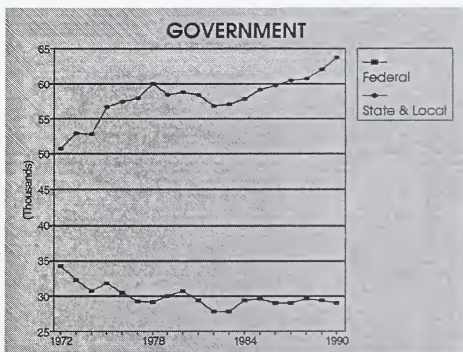
Graph 3.1.3

Restaurants are the largest employment group within the Retail activity classification. Restaurants include all eating and drinking places. From 1972 to 1987, employment within this group shows significant and almost constant growth. Since 1987, employment has remained stable. "Other Retail" includes building materials, garden supplies, furniture, homefurnishing stores and some miscellaneous activities. They represent a major percentage of the entire Retail classification which has increased significantly. Food stores have also shown a significant increase.

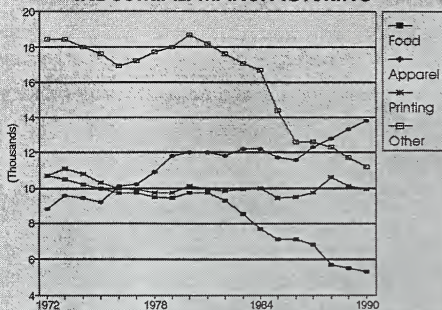


Graph 3.1.4

There is a clear trend within Government activity in which State and Local employment grows while Federal employment decreases. During the early 1980s, these two sectors experienced similar trends, declining from 1980 to 1982 and then recovering.



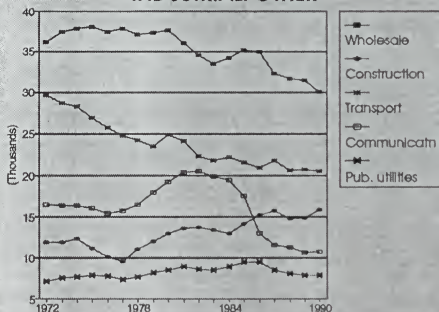
INDUSTRIAL: MANUFACTURING



Graph 3.1.5

This graph includes the employment groups within Industrial activity that are related to manufacturing. Among them, apparel manufacturing has become the largest group, showing an almost constant growth which has accelerated since 1986. Food manufacturing is showing a significant decline parallel to Other manufacturing which includes chemical goods, fumitures, metals, transportation, etc.

INDUSTRIAL: OTHER



Graph 3.1.6

Other employment groups within Industrial activity show the loss of employment in wholesale, transportation, and communication, which were the three largest groups in 1972. Construction as shown in this graph, and food manufacturing shown in the previous graph are the only two employment groups that have significantly increased within this eighteen year period.

3.1.3 EMPLOYMENT DISTRIBUTION BY COMMERCE AND INDUSTRY DISTRICTS

As Indicated before, the following figures expressing employment distribution by Commerce and Industry Districts are based on estimates from establishment data prepared by County Business Patterns, US Department of Commerce. Because these data rely on establishments classified by employment size ranges, employment figures by Commerce and Industry Districts shall be only used as references, considering a margin of error. The C&I Districts are defined in the Introduction, Data Formats section, page 6.

Table 3.1.2 shows employment concentration within the Financial and South of Market districts, which together represent more than 55 percent of the total employment. There is even a greater percent of Office employment concentration in the Financial district (64 percent). To a lesser degree, Industrial activities are also concentrated in the Financial and South of Market districts. Hotel activity also shows a concentrated employment distribution of more than 68 percent between Civic Center and North Beach/Chinatown districts (which includes Fisherman's Wharf). Retail and Cultural/Institutional activities show a more decentralized distribution of employment than other activities, with less than 25 percent in any one district.

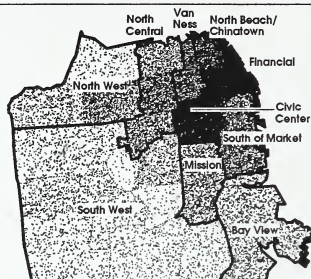
Table 3.1.2

EMPLOYMENT PERCENTAGE DISTRIBUTION BY C&I DISTRICT AND LAND USE ACTIVITY
1987

DISTRICT	TOTAL	Office	Retail	Industrial	Cultural/ Hotel	Institutional
Financial	40.01	64.38	18.31	37.14	10.69	15.99
Civic Center	7.26	6.27	11.43	1.84	36.72	6.64
N.Beach/Chinatown	8.71	5.93	15.97	6.11	31.83	6.02
Van Ness	3.58	2.87	6.64	1.48	6.31	4.59
South of Market	15.03	10.54	12.70	29.83	8.87	6.43
Mission	2.86	0.61	3.98	3.93	0.06	6.14
North Central	6.81	2.83	8.65	1.10	3.01	24.68
North West	4.23	1.78	5.68	0.81	0.17	15.16
South West	6.30	3.30	12.12	3.23	0.55	13.47
Bay View	3.36	1.18	2.98	9.06	0.14	0.79
Other	1.83	0.32	1.53	5.44	1.65	0.08
Total	100.00	100.00	100.00	100.00	100.00	100.00

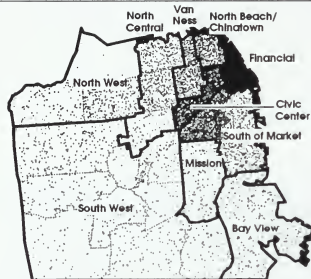
Source: Department of City Planning
County Business Patterns, 1987

MAP 3.1.1 EMPLOYMENT DISTRIBUTION BY C&I DISTRICTS

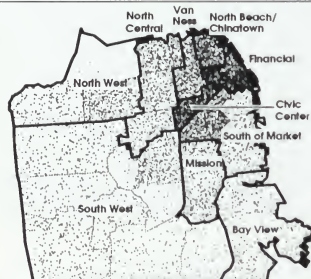


TOTAL

Maps presented have been generated as dot density maps to describe the relationship between number of employees and area. Each dot represents ten employees. However, the dots only indicate random distribution of employees within each zip code. They do not represent actual location of employment site.

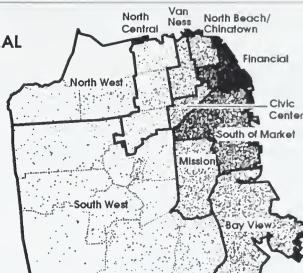


OFFICE

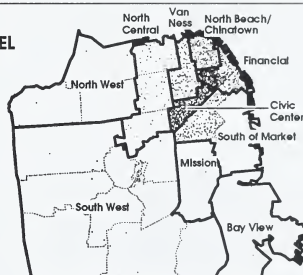


RETAIL

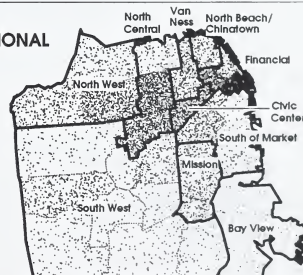
INDUSTRIAL



HOTEL

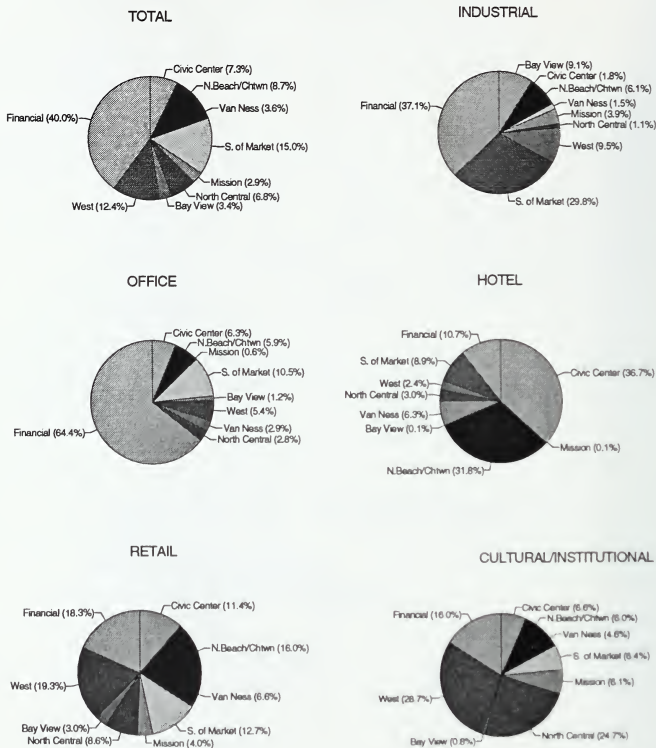


CULTURAL/INSTITUTIONAL



Source: Department of City Planning
County Business Patterns

Graph 3.1.7
EMPLOYMENT DISTRIBUTION BY COMMERCE AND INDUSTRY DISTRICTS: 1987



Source: Department of City Planning
 County Business Patterns

3.1.3 EMPLOYMENT DISTRIBUTION BY ESTABLISHMENT SIZE

As explained in the previous section 3.1.2, employment data by establishments size are estimated from establishments data provided by County Business Patterns, 1987. Table 3.1.3 shows the percentage distribution of employment by establishment size within each C&I district. Based on the same data, Graph 3.1.8 shows the employment distribution by C&I districts within each size class. There are four size classes, based on the number of employees per establishment from one to over a thousand.

Districts with a high percentage of their total employment within the small establishments classification (1-9) are districts that have a major residential component such as South West, Mission, North West, Van Ness, and North Central. The Financial and South of Market districts, which have a very small residential component and a large percent of Office activity, are districts with the smallest percentage of small establishments within their total employment. Within the second classification, 10 to 99 employees per establishment, districts with significant Retail and Industrial activities tend to show higher employment percentages. Among all districts, the Financial district has the greatest percentage of its employment within the size class from 100 to 999 employees. Civic Center, North Central, and North West, districts that house many Cultural/Institutional activities, seem to have high employment allocation within large establishments.

EMPLOYMENT BY C&I DISTRICT AND ESTABLISHMENT SIZE CLASS
Percentage distribution by size class
1987

District	Establishment size class				TOTAL
	1-9	10-99	100-999	1000+	
Financial	9.43	35.51	40.24	14.83	100.00
Civic Center	12.64	34.71	25.71	26.94	100.00
N.Beach/Chinatown	18.83	46.29	27.93	6.96	100.00
Van Ness	21.42	45.86	32.72	0.00	100.00
South of Market	12.45	42.04	33.16	12.35	100.00
Mission	24.86	39.69	24.71	10.74	100.00
North Central	20.18	32.92	17.93	28.96	100.00
North West	21.90	30.70	24.63	22.77	100.00
South West	31.14	41.61	22.49	4.77	100.00
Bay View	14.57	56.71	28.72	0.00	100.00
Other	2.53	12.97	47.48	37.01	100.00
TOTAL	14.54	38.33	32.79	14.34	100.00

Source: Department of City Planning
County Business Patterns

Graph 3.1.8

EMPLOYMENT DISTRIBUTION BY C&I DISTRICTS BY ESTABLISHMENT SIZE CLASS

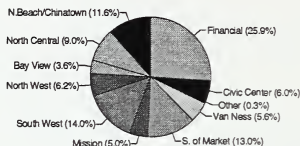
From the four size classes, the first one, representing the smallest establishments, shows the most even employment distribution among all C&I districts.

Employment in establishments of 10 to 99 employees are mainly represented within five districts: Financial, South of Market, North Beach/Chinatown, South West, and Civic Center districts.

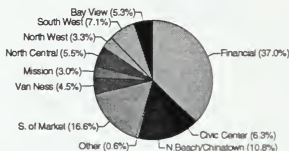
The third class shows employment concentration within the Financial and South of Market districts representing together almost 65 per cent of total employment in this class.

Employment in large establishments is distributed among several districts. There are some districts that do not have large establishments or have very few.

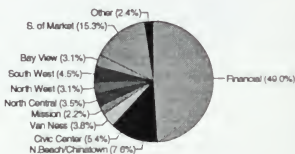
EMPLOYMENT: ESTABLISHMENT SIZE 1-9



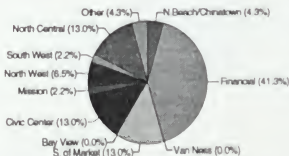
EMPLOYMENT: ESTABLISHMENT SIZE 10-99



EMPLOYMENT: ESTABLISHMENT SIZE 100-999



EMPLOYMENT: ESTABLISHMENT SIZE 1000+



3.2 ESTABLISHMENTS

The description of the San Francisco business establishments is based on 1987 County Business Patterns (CBP) data, classified by zip code and Industry Group. As explained before, this data source is the only one available by two, three and four-digit SIC. The 1987 data are the last available information disaggregated by zip code.

The County Business Patterns defines establishment as "a single physical location at which business is conducted or where services or industrial operations are performed". This is different from a company or enterprise which may consist of several establishments. Establishments are classified within specific industry groups based on their predominant activity. The data reported by CBP excludes information that may disclose the operations of an individual employer.

While the San Francisco employment data, presented in the previous section, are described as a trend over time from 1976 to 1990, the establishment data focus on geographical distribution within the city at one point in time. The information is first classified by Land Use Activities and Commerce and Industry districts, which are the data formats defined for this inventory. These formats are described in detail within the Introduction, Data formats section, page 3. In addition to the establishments classification by the six Land Use activities, each activity is disaggregated into small industry groups to the two SIC digit level. The establishment data presented by Commerce and Industry districts are disaggregated by zip code.

3.2.1 Establishments Distribution by Land Use Activity and C&I Districts.

As indicated in table 3.2.1, in 1987, Office activity accounted for the largest number of establishments (39 percent) in the city. Retail activity with 27 percent and Industrial activity with 19 percent are the second and third largest activities in the city.

While Office establishments are highly concentrated in the Financial district (53 percent), Retail and Cultural/Institutional establishments are more dispersed throughout South of Market, North West, North Central, South West, and Financial Districts. Industrial and Hotel establishments tend to be concentrated in few Districts. Industrial establishments are concentrated in South of Market, Financial, and Bay View Districts; and Hotel establishments in Financial, North Central and Civic Center.

The Financial district contains more than thirty percent of the total number of establishments, followed by South of Market and South West with 13 and 12 percent respectively. Two C&I Districts in San Francisco are very specialized, having more than 50 percent of its establishments in one activity. Bay View District shows 64 percent of its establishments as Industrial and the Financial District 59 percent as Office. Other Districts, such as Mission and South West, show a more diverse set of activities with no single activity dominating.

Table 3.2.1**ESTABLISHMENTS BY COMMERCE AND INDUSTRY DISTRICTS AND LAND USE ACTIVITIES**Number of Establishments
1987

	OFFICE	RETAIL	INDUSTRL	CULT/INST	HOTEL	TOTAL
Financial	6,352	1,885	1,609	920	74	10,840
Civic Center	711	595	194	366	50	1,916
N. Beach/Chinatown	515	651	224	144	20	1,554
Van Ness	577	650	139	297	39	1,702
South of Market	1,187	962	1,655	328	33	4,165
Mission	242	509	338	308	4	1,401
North Central	695	914	216	691	55	2,571
North West	487	616	225	520	7	1,855
South West	1,117	1,401	675	831	23	4,047
Bay View	150	195	716	59	3	1,123
Other	39	23	44	12	1	119
TOTAL	12,072	8,401	6,035	4,476	309	31,293

Percentage distribution of establishments by Land Use Activities

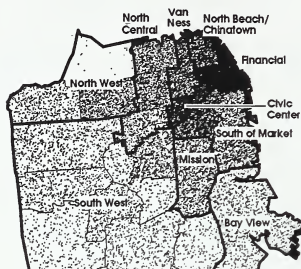
	OFFICE	RETAIL	INDUSTRL	CULT/INST	HOTEL	TOTAL
Financial	58.60	17.39	14.84	8.49	0.68	100.00
Civic Center	37.11	31.05	10.13	19.10	2.61	100.00
N. Beach/Chinatown	33.14	41.89	14.41	9.27	1.29	100.00
Van Ness	33.90	38.19	8.17	17.45	2.29	100.00
South of Market	28.50	23.10	39.74	7.88	0.79	100.00
Mission	17.27	36.33	24.13	21.98	0.29	100.00
North Central	27.03	35.55	8.40	26.88	2.14	100.00
North West	26.25	33.21	12.13	28.03	0.38	100.00
South West	27.60	34.62	16.68	20.53	0.57	100.00
Bay View	13.36	17.36	63.76	5.25	0.27	100.00
Other	32.77	19.33	36.97	10.08	0.84	100.00
TOTAL	38.58	26.85	19.29	14.30	0.99	100.00

Percentage distribution of establishments by Commerce and Industry Districts

	OFFICE	RETAIL	INDUSTRL	CULT/INST	HOTEL	TOTAL
Financial	52.62	22.44	26.66	20.55	23.95	34.64
Civic Center	5.89	7.08	3.21	8.18	16.18	6.12
N. Beach/Chinatown	4.27	7.75	3.71	3.22	6.47	4.97
Van Ness	4.78	7.74	2.30	6.64	12.62	5.44
South of Market	9.83	11.45	27.42	7.33	10.68	13.31
Mission	2.00	6.06	5.60	6.88	1.29	4.48
North Central	5.76	10.88	3.58	15.44	17.80	8.22
North West	4.03	7.33	3.73	11.62	2.27	5.93
South West	9.25	16.68	11.18	18.57	7.44	12.93
Bay View	1.24	2.32	11.86	1.32	0.97	3.59
Other	0.32	0.27	0.73	0.27	0.32	0.38
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00

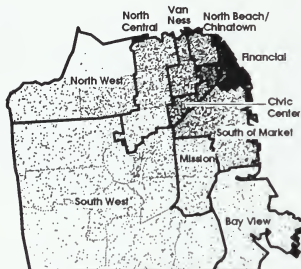
Source: City Planning Department
County Business Patterns, 1987

MAPS 3.2.1 ESTABLISHMENTS DISTRIBUTION BY C&I DISTRICTS

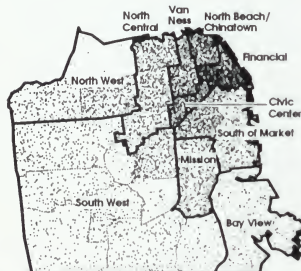


TOTAL

Maps presented have been generated as dot density maps to describe the relationship between number of establishments and area. However, the dots only indicate random distribution of establishments within each zip code. They do not represent actual location of establishments.

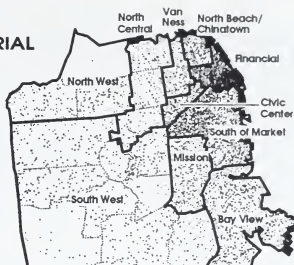


OFFICE

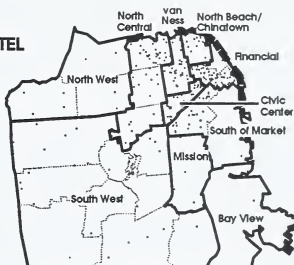


RETAIL

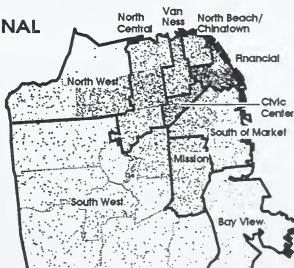
INDUSTRIAL



HOTEL



CULTURAL/INSTITUTIONAL



Source: Department of City Planning
County Business Patterns

3.2.2 Establishments Distribution by SIC Codes and Commerce and Industry Districts

In addition to the establishment data presented by Land Use activities, Tables 3.2.2 to 3.2.5 show a detailed breakdown of industry groups (two-digit SIC) included within each of those activities. Hotel and Government activities are not included in this series of tables because Hotel represents only one industry group (70) and Government data are not reported by the CBP establishments data.

The largest Industry groups in Office activity are F.I.R.E., Business services, legal services, and architecture and engineering. They together form 80 percent of the total Office activity. The Financial district contains the majority of all Legal services (59 percent) and F.I.R.E. (69 percent) establishments. Business, architecture and engineering services have a significant representation, besides the Financial district, in South of Market and South West districts.

Table 3.2.3 shows Eating and drinking establishments as the largest industry group within Retail activity. They are mainly located in North Beach/Chinatown, Civic Center, North West, and Van Ness. Personal services establishments also have a significant participation, specially in the South West, Financial, and North Central Districts. Food stores are the third largest category of retail establishments. North Beach/Chinatown, South West, and Mission districts show a high percentage of their establishments within food stores. Apparel stores are the most concentrated type of store within the Financial district. There is also a large number of establishments clustered into the miscellaneous category.

As indicated in Table 3.2.4, construction and wholesale establishments represent 62 percent of all Industrial establishments. Printing and publishing, transportation, and apparel manufacturing industries account for more than 400 establishments each. Most Industrial establishments are located in South of Market, which contains more than 27 percent of total establishments. Bay View district, which has limited participation in other activities, shows the third largest concentration of Industrial establishments. They are mainly related to food manufacturing and transportation. South West district contains the largest number of construction establishments (418), citywide, which represents 62 percent of the total establishments within this district.

More than 50 percent of all Cultural/Institutional establishments are within Health services. They are mainly located in the Financial, North Central, South West, and North West districts. Membership organizations and social services establishments are the second and third largest groups with 18 and 12 percent of all Cultural/Institutional establishments. Educational establishments represent 7 percent. The three remaining groups, motion picture, amusement and recreation, and museums, make up the remaining 10 percent of the total.

Table 3.2.2

	TOTAL	0-14	47	60-7	73	81	89	00
Financial	6,352	66	262	2,581	1,311	1,132	625	375
Civic Center	711	2	54	214	140	148	76	77
N. Beach/Chinatown	515	7	26	143	145	59	68	67
Van Ness	577	4	20	223	119	76	72	63
South of Market	1,187	17	54	300	428	63	187	138
Mission	242	9	6	55	63	24	28	57
North Central	695	16	26	213	196	64	73	107
North West	487	10	14	195	122	18	61	67
South West	1,117	37	41	422	254	59	124	180
Bay View	150	4	8	24	68	2	17	27
Other	39	0	8	11	14	1	1	4
TOTAL	12,072	172	519	4,381	2,860	1,646	1,332	1,162

Percentage distribution of establishments by C&I Districts

	TOTAL	0-14	47	60-7	73	81	89	00
Financial	53	38	50	59	46	69	47	32
Civic Center	6	1	10	5	5	9	6	7
N. Beach/Chinatown	4	4	5	3	5	4	5	6
Van Ness	5	2	4	5	4	5	5	5
South of Market	10	10	10	7	15	4	14	12
Mission	2	5	1	1	2	1	2	5
North Central	6	9	5	5	7	4	5	9
North West	4	6	3	4	4	1	5	6
South West	9	22	8	10	9	4	9	15
Bay View	1	2	2	1	2	0	1	2
Other	0	0	2	0	0	0	0	0
TOTAL	100	100	100	100	100	100	100	100

Percentage distribution of establishments by Industry Groups (SIC)

	TOTAL	0-14	47	60-7	73	81	89	00
Financial	100	1	4	41	21	19	10	4
Civic Center	100	0	8	30	20	21	11	11
N. Beach/Chinatown	100	1	5	28	28	11	13	13
Van Ness	100	1	3	39	21	13	12	11
South of Market	100	1	5	25	36	5	16	12
Mission	100	4	2	23	26	10	12	24
North Central	100	2	4	31	28	9	11	15
North West	100	2	3	40	25	4	13	14
South West	100	3	4	38	23	5	11	16
Bay View	100	3	5	16	45	1	11	18
Other	100	0	21	28	36	3	3	10
TOTAL	100	1	4	36	24	14	11	10

Source: Department of City Planning
County Business Patterns, 1987

INDUSTRY GROUPS, SIC

- 0-14: Agriculture, forestry, fishing and mining.
- 47: Transportation services
- 60-7: Finance, Insurance, and Real Estate
- 73: Business Services
- 81: Legal Services
- 89: Engineering and Architectural Services
- 00: Other

Table 3.2.3 RETAIL ESTABLISHMENTS BY C&J DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)
1987

INDUSTRY GROUPS,
SIC

	TOTAL	53	54	55	56	57	58	59	72	75	76
Financial	1,885	15	145	38	265	83	550	447	189	126	27
Civic Center	595	3	54	10	46	18	215	128	59	53	9
N. Beach/Chinatown	651	7	114	8	47	18	240	151	35	27	4
Van Ness	650	4	75	21	46	37	208	113	64	74	8
South of Market	962	13	63	45	62	66	281	174	59	145	54
Mission	509	6	79	20	43	28	152	81	46	37	17
North Central	914	7	114	29	90	43	268	215	106	39	3
North West	616	4	86	31	48	43	200	106	66	23	9
South West	1,401	15	233	90	83	69	403	226	202	47	33
Bay View	195	4	19	17	4	17	31	44	12	26	21
Other	23	1	2	0	0	1	6	6	3	3	1
TOTAL	8,401	79	984	309	734	423	2,554	1,691	841	600	186

Percentage distribution of establishments by C&J Districts

	TOTAL	53	54	55	56	57	58	59	72	75	76
Financial	22	19	15	12	36	20	22	26	22	21	15
Civic Center	7	4	5	3	6	4	8	8	7	9	5
N. Beach/Chinatown	8	9	12	3	6	4	9	9	4	5	2
Van Ness	8	5	8	7	6	9	8	7	8	12	4
South of Market	11	16	6	15	8	16	11	10	7	24	29
Mission	6	8	8	6	6	7	6	5	5	6	9
North Central	11	9	12	9	12	10	10	13	13	7	2
North West	7	5	9	10	7	10	8	6	8	4	5
South West	17	19	24	29	11	16	16	13	24	8	18
Bay View	2	5	2	6	1	4	1	3	1	4	11
Other	0	1	0	0	0	0	0	0	0	1	1
TOTAL	100	100	100	100	100	100	100	100	100	100	100

Percentage distribution of establishments by Main Industry Groups (SIC)

	TOTAL	53	54	55	56	57	58	59	72	75	76
Financial	100	1	8	2	14	4	29	24	10	7	1
Civic Center	100	1	9	2	8	3	36	22	10	9	2
N. Beach/Chinatown	100	1	18	1	7	3	37	23	5	4	1
Van Ness	100	1	12	3	7	6	32	17	10	11	1
South of Market	100	1	7	5	6	7	29	18	6	15	6
Mission	100	1	16	4	8	6	30	16	9	7	3
North Central	100	1	12	3	10	5	29	24	12	4	0
North West	100	1	14	5	8	7	32	17	11	4	1
South West	100	1	17	6	6	5	29	16	14	3	2
Bay View	100	2	10	9	2	9	16	23	6	13	11
Other	100	4	9	0	0	4	26	26	13	13	4
TOTAL	100	1	12	4	9	5	30	20	10	7	2

Source: City Planning Department
County Business Patterns, 1987

District	TOTAL	15-7	20	23	27	39+	40-7	48	49	50	51
Financial	1,609	265	18	67	150	277	122	51	41	338	280
Civic Center	194	22	4	19	9	20	16	6	5	62	31
N. Beach/Chinatown	224	31	10	81	16	17	6	4	0	20	39
Van Ness	139	38	4	20	7	9	5	4	1	29	22
South of Market	1,655	217	25	161	166	172	107	22	12	448	325
Mission	338	127	6	36	18	44	13	9	0	45	40
North Central	216	89	1	4	25	11	19	3	1	27	36
North West	225	131	4	6	11	10	10	1	0	27	25
South West	675	418	6	13	30	37	26	6	2	73	64
Bay View	716	159	26	4	25	122	80	3	1	157	139
Other	44	2	0	0	4	0	31	0	3	1	3
TOTAL	6,035	1,499	104	411	461	719	435	109	66	1,227	1,004

Percentage distribution of establishments by C&I Districts

District	TOTAL	15-7	20	23	27	39+	40-7	48	49	50	51
Financial	27	18	17	16	33	39	28	47	62	28	28
Civic Center	3	1	4	5	2	3	4	6	8	5	3
N. Beach/Chinatown	4	2	10	20	3	2	1	4	0	2	4
Van Ness	2	3	4	5	2	1	1	4	2	2	2
South of Market	27	14	24	39	36	24	25	20	18	37	32
Mission	6	8	6	9	4	6	3	8	0	4	4
North Central	4	6	1	1	5	2	4	3	2	2	4
North West	4	9	4	1	2	1	2	1	0	2	2
South West	11	28	6	3	7	5	6	6	3	6	6
Bay View	12	11	25	1	5	17	18	3	2	13	14
Other	1	0	0	0	1	0	7	0	5	0	0
TOTAL	100	100	100	100	100	100	100	100	100	100	100

Percentage distribution of establishments by Main Industry Groups (SIC)

District	TOTAL	15-7	20	23	27	39+	40-7	48	49	50	51
Financial	100	16	1	4	9	17	8	3	3	21	17
Civic Center	100	11	2	10	5	10	8	3	3	32	16
N. Beach/Chinatown	100	14	4	36	7	8	3	2	0	9	17
Van Ness	100	27	3	14	5	6	4	3	1	21	16
South of Market	100	13	2	10	10	10	6	1	1	27	20
Mission	100	38	2	11	5	13	4	3	0	13	12
North Central	100	41	0	2	12	5	9	1	0	13	17
North West	100	58	2	3	5	4	4	0	0	12	11
South West	100	62	1	2	4	5	4	1	0	11	9
Bay View	100	22	4	1	3	17	11	0	0	22	19
Other	100	5	0	0	9	0	70	0	7	2	7
TOTAL	100	25	2	7	8	12	7	2	1	20	17

INDUSTRY GROUPS, SIC

- 15-7: Construction
- 20: Food and kindred products
- 23: Apparel & other textile products
- 27: Printing and publishing
- 39+: Other manufacturing
- 40-7: Transportation
- 48: Communications
- 49: Electric, gas, & sanitary services
- 50: Wholesale, durable goods
- 51: Wholesale, nondurable goods

Source: City Planning Department
County Business Patterns, 1987

Table 3.2.5 CULTURAL/INSTITUTIONAL ESTABLISHMENTS BY C&J DISTRICTS AND MAIN INDUSTRY GROUPS (SIC)
1987

INDUSTRY GROUPS, SIC

78: Motion Pictures

79: Amusement and recreation
services

80: Health services

82: Educational services

83: Social services

84: Museums, botanical, zoologi-
cal gardens

86: Membership organizations

District	TOTAL	78	79	80	82	83	84	86
Financial	920	28	48	475	70	90	4	205
Civic Center	366	24	28	155	24	50	1	84
N.Beach/Chinatown	144	17	14	70	11	11	1	20
Van Ness	297	15	9	174	14	29	1	55
South of Market	328	58	33	36	31	68	5	97
Mission	308	7	22	164	19	51	2	43
North Central	691	13	34	441	42	85	8	68
North West	520	10	15	366	25	53	5	46
South West	831	15	43	416	73	106	2	176
Bay View	59	4	4	11	4	14	0	22
Other	12	0	2	4	2	1	0	3
TOTAL	4,476	191	252	2,312	315	558	29	819

Distribution of establishments by C&J Districts

District	TOTAL	78	79	80	82	83	84	86
Financial	21	15	19	21	22	16	14	25
Civic Center	8	13	11	7	8	9	3	10
N.Beach/Chinatown	3	9	6	3	3	2	3	2
Van Ness	7	8	4	8	4	5	3	7
South of Market	7	30	13	2	10	12	17	12
Mission	7	4	9	7	6	9	7	5
North Central	15	7	13	19	13	15	28	8
North West	12	5	6	16	8	10	17	6
South West	19	8	17	18	23	19	7	21
Bay View	1	2	2	0	1	3	0	3
Other	0	0	1	0	1	0	0	0
TOTAL	100	100	100	100	100	100	100	100

Percentage distribution of establishments by Main Industry Groups (SIC)

District	TOTAL	78	79	80	82	83	84	86
Financial	100	3	5	52	8	10	0	22
Civic Center	100	7	8	42	7	14	0	23
N.Beach/Chinatown	100	12	10	49	8	8	1	14
Van Ness	100	5	3	59	5	10	0	19
South of Market	100	18	10	11	9	21	2	30
Mission	100	2	7	53	6	17	1	14
North Central	100	2	5	64	6	12	1	10
North West	100	2	3	70	5	10	1	9
South West	100	2	5	50	9	13	0	21
Bay View	100	7	7	19	7	24	0	37
Other	100	0	17	33	17	8	0	25
TOTAL	100	4	6	52	7	12	1	18

Source: City Planning Department
County Business Patterns, 1987

3.2.3 Establishments by Zip Code and Land Use Activity

The County Business Patterns provides more detailed information about establishments by zip codes for 1987. The following tables, 3.2.6 and 3.2.7 show the distribution of establishments by zip code and Land Use Activities.

The largest concentration of establishments is within zip code 94105 with almost 4,000 establishments. This is also the zip code that contains the largest number of Office and Industrial establishments citywide. Within the Financial district, zip code 94105 concentrates around 40 percent of all establishments.

Table 3.2.6

ESTABLISHMENTS BY ZIP CODE AND LAND USE ACTIVITY
1987

	Zip Code	TOTAL	Office	Retail	Industrial	Hotel	Cultural/ Institutional
Financial	94104	2,204	1,800	173	154	10	67
	94105	3,998	1,966	678	943	30	376
	94111	2,611	1,849	365	288	4	104
Civic Center	94102	1,919	711	598	193	50	366
North Beach/	94108	2,051	737	693	217	30	373
Chinatown	94133	1,561	515	658	224	20	144
Van Ness	94109	1,708	577	656	139	39	297
South of	94103	2,431	674	607	894	31	220
Market	94107	1,749	513	370	749	2	108
Mission	94110	1,411	242	519	335	4	308
North Central	94115	1,057	258	310	77	11	401
	94117	570	111	226	64	13	156
	94123	958	326	392	75	31	134
North West	94118	1,275	328	414	120	3	409
	94121	574	154	210	103	4	103
	94129	19	5	5	1		8
South West	94112	647	175	225	125	4	115
	94114	735	195	313	82	3	142
	94116	521	145	151	129	4	92
	94122	830	226	330	132	8	133
	94127	443	138	141	43		120
	94131	273	106	58	54	2	53
	94132	371	72	135	27	1	136
	94134	249	60	70	76	1	40
Bay View	94124	1,134	150	206	707	3	59
Others	94128	80	22	16	38	1	3
	94130	9	2	3	2		2
	94119	30	15	4	4		7
TOTAL		31,418	12,072	8,526	5,995	309	4,476

Source: Department of City Planning
County Business Patterns, 1987

Table 3.2.7 ESTABLISHMENT PERCENTAGE BY ZIP CODE AND LAND USE ACTIVITY
1987

	Zip Code	TOTAL	Office	Retail	Industrial	Hotel	Cultural/ Institutional
Financial	94104	7.0	14.9	2.0	2.6	3.2	1.5
	94105	12.7	16.3	8.0	15.7	9.7	8.4
	94111	8.3	15.3	4.3	4.8	1.3	2.3
Civic Center	94102	6.1	5.9	7.0	3.2	16.2	8.2
North Beach/ Chinatown	94108	6.5	6.1	8.1	3.6	9.7	8.3
	94133	5.0	4.3	7.7	3.7	6.5	3.2
Van Ness	94109	5.4	4.8	7.7	2.3	12.6	6.6
South of Market	94103	7.7	5.6	7.1	14.9	10.0	4.9
	94107	5.6	4.2	4.3	12.5	0.6	2.4
Mission	94110	4.5	2.0	6.1	5.6	1.3	6.9
North Central	94115	3.4	2.1	3.6	1.3	3.6	9.0
	94117	1.8	0.9	2.7	1.1	4.2	3.5
	94123	3.0	2.7	4.6	1.3	10.0	3.0
North West	94118	4.1	2.7	4.9	2.0	1.0	9.1
	94121	1.8	1.3	2.5	1.7	1.3	2.3
	94129	0.1	0.0	0.1	0.0	0.0	0.2
South West	94112	2.1	1.4	2.6	2.1	1.3	2.6
	94114	2.3	1.6	3.7	1.4	1.0	3.2
	94116	1.7	1.2	1.8	2.2	1.3	2.1
	94122	2.6	1.9	3.9	2.2	2.6	3.0
	94127	1.4	1.1	1.7	0.7	0.0	2.7
	94131	0.9	0.9	0.7	0.9	0.6	1.2
	94132	1.2	0.6	1.6	0.5	0.3	3.0
	94134	0.8	0.5	0.8	1.3	0.3	0.9
Bay View	94124	3.6	1.2	2.4	11.8	1.0	1.3
Others	94128	0.3	0.2	0.2	0.6	0.3	0.1
	94130	0.0	0.0	0.0	0.0	0.0	0.0
	94119	0.1	0.1	0.0	0.1	0.0	0.2
TOTAL		100.0	100.0	100.0	100.0	100.0	100.0

Source: Department of City Planning
County Business Patterns, 1987

This subdivision of C&I districts into zip code areas highlights uneven distribution of establishments and activities in some districts. North West shows more than 60 percent of all its establishments in 94118, one of three zip code areas. North Central only shows less than 25 percent in 94117, one of its three zip code areas. Within South of Market, zip code 94103 shows almost 60 percent of establishments while 94107 only 40 percent.

The Financial district shows a relatively even distribution of Office establishments among its three zip code areas, but all the other establishments are concentrated in 94105. More than 50 percent of Retail establishments and more than 70 percent of Industrial, Hotel, and Cultural/Institutional establishments are concentrated in 94105.

3.2.4 ESTABLISHMENTS BY SIZE CLASS

The establishment data by size class and C&I District are also provided by County Business Patterns, 1987. Size classes are determined by the number of paid employees in the mid-March period per establishment. The size group 1 to 4 include establishments that did not report any paid employees in the mid-March pay period but paid wages to at least one employee at some time during the year.

The number of smallest establishments, 1 to 4 employees, account for more than 50 percent of the total. Establishments with 5 to 9, 10 to 19, and 20 to 49 employees constitute about 39 percent of the total number of establishments. And the last five classifications which range from 50 to more than a thousand employees represent about 5 percent of the total number of establishments.

The largest establishments are concentrated in the Financial district with 46 percent of the total. Civic Center, North Central and South of Market each has 13 percent of the total largest establishments. Other districts have few establishments of this size. The smallest establishments, which are less concentrated than large establishments, are spread among the Financial district (31 percent), South West district (16 percent) and South of Market (12 percent).

All districts have their largest number of establishments within the smallest classification. However, while Bay View shows only 39 percent of its total number of establishments in the smallest classification, North and South West show 66 percent each. Bay View district also shows a greater proportional share for establishments of 5 to 9, 10 to 19, and 20 to 49 employees, than any other district. Bay View, Mission and South of Market Districts show a significant proportion of their establishments with 5 to 9 employees (23, 22, and 20 percent). The Financial District shows a greater proportional share of establishments with 50 to 999 employees than other districts. South West, North West, and North Central Districts show the greatest share of the smallest establishments.

City-wide, there are 360 establishments with 1 to 4 employees for each establishment with more than 1,000 employees. Among all districts, Civic Center shows the greatest percentage (0.31) of its total establishments allocated in establishments with more than 1,000 employees. This results in the lowest ratio small/large establishment of 177, which means that for each large establishment in Civic Center there are 177 small establishments. North West and Financial Districts have the second and third lowest ratio small/large establishments of 265 and 270.

Table 3.2.8 ESTABLISHMENTS BY C&I DISTRICTS AND SIZE CLASS
1987

DISTRICT	Number of employees by establishment									TOTAL
	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000	
Financial	5,391	1,989	1,463	1,170	444	281	73	32	21	10,864
Civic Center	1,069	342	235	162	66	29	6	4	6	1,919
N. Beach/Chinatown	848	281	216	151	38	18	8	1	0	1,561
Van Ness	1,013	306	209	118	39	13	7	3	0	1,708
South of Market	2,006	839	586	478	158	76	20	11	6	4,180
Mission	816	304	178	77	19	13	1	2	1	1,411
North Central	1,591	507	263	161	41	19	5	2	6	2,585
North West	1,237	300	201	92	16	12	4	3	3	1,868
South West	2,702	713	389	177	53	25	7	2	1	4,069
Bay View	447	267	185	162	45	23	5	0	0	1,134
Others	51	17	13	16	7	5	6	2	2	119
	17,171	5,865	3,928	2,764	926	514	142	62	46	31,418

Percentage distribution by Size Class

DISTRICT	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000	TOTAL
Financial	31	34	37	42	48	55	51	52	46	35
Civic Center	6	6	6	6	7	6	4	6	13	6
N. Beach/Chinatown	5	5	6	5	4	4	6	2	0	5
Van Ness	6	5	5	4	4	3	5	5	0	5
South of Market	12	14	15	17	17	15	14	18	13	13
Mission	5	5	5	3	2	3	1	3	2	4
North Central	9	9	6	6	4	4	4	3	13	8
North West	7	5	5	3	2	2	3	5	7	6
South West	16	12	10	6	6	5	5	3	2	13
Bay View	3	5	5	6	5	4	4	0	0	4
Others	0	0	0	1	1	1	4	3	4	0
	100	100	100	100	100	100	100	100	100	100

Percentage distribution by C&I District

DISTRICT	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000	TOTAL
Financial	50	18	13	11	4	3	1	0	0	100
Civic Center	56	18	12	8	3	2	0	0	0	100
N. Beach/Chinatown	54	18	14	10	2	1	1	0	0	100
Van Ness	59	18	12	7	2	1	0	0	0	100
South of Market	48	20	14	11	4	2	0	0	0	100
Mission	58	22	13	5	1	1	0	0	0	100
North Central	62	20	10	6	2	1	0	0	0	100
North West	66	16	11	5	1	1	0	0	0	100
South West	66	18	10	4	1	1	0	0	0	100
Bay View	39	24	16	14	4	2	0	0	0	100
Others	43	14	11	13	6	4	5	2	2	100
	55	19	13	9	3	2	0	0	0	100

Source: Department of City Planning
County Business Patterns, 1987

3.3 WAGES AND PROPRIETORS' INCOME, BUSINESS REVENUES, CITY REVENUES AND EXPENDITURES

This section presents data about major trends in money transactions in San Francisco that result from and influence economic activities. The three sections focus on different sectors of the City's economy. First, we examine the income that individuals receive from their work in San Francisco, either from wages and salaries or from self-employment. This section complements the earlier discussion of employment by describing the earnings from employment. The second section describes the aggregate revenues that businesses receive, and breaks that data down geographically and by type of business. The third section describes the revenues and expenditures of the City and County of San Francisco and how they have changed over time.

3.3.1 WAGES AND PROPRIETORS' INCOME

This section presents two sets of data which describe the earnings of those who are employed in San Francisco. Annual wage data, for the 1976-90 period, come from the California Employment Development Department. This data set is presented by Land Use Activities. It includes the wages and salaries of those employed in businesses and other establishments.

Personal Income data, for the 1981-89 period, come from the US Department of Commerce, Bureau of Economic Analysis. They also include wages and salaries, but in addition include other labor income and proprietors' income, by industry groups, using the Standard Industrial Classification (SIC) system.

3.3.1.1 California Employment Development Department Data.

The first data set describes wages of payroll employees by industry groups. It includes all full-time and part-time employees, including employees on paid vacation or sick leave who work in or receive compensation from establishments for any part of the pay period which includes the 12th of the month. Self-employed people, unpaid volunteers, and family workers as well as private household workers, and persons in labor-management disputes are excluded.

Table 3.3.1

UNADJUSTED WAGES BY LAND USE ACTIVITIES
(Annual wages in \$1,000)
1976-1990

YEAR	TOTAL	OFFICE	RETAIL	INDUSTRIAL	HOTEL	CULTURAL/ INSTITUTIONAL	GOVERNMENT
1976	5,285,479	1,420,355	522,625	2,345,822	88,499	571,366	336,813
1977	6,317,056	1,756,506	641,370	2,656,428	92,610	682,316	487,828
1978	7,514,420	2,030,687	716,664	2,922,407	107,990	994,109	742,564
1979	8,379,314	2,444,437	793,809	3,185,295	124,473	1,051,505	779,796
1980	9,610,709	2,820,438	1,035,153	3,660,147	126,136	1,118,971	849,864
1981	10,797,733	3,308,953	1,137,176	4,077,457	139,762	1,278,434	855,949
1982	11,721,719	3,737,774	1,000,375	4,419,711	171,686	1,496,362	895,810
1983	12,428,668	4,504,059	1,065,764	4,164,500	187,065	1,635,471	871,810
1984	13,309,502	4,813,339	1,163,844	4,404,903	219,380	1,743,516	964,520
1985	14,197,427	5,217,563	1,255,971	4,541,877	228,774	1,911,961	1,041,281
1986	15,073,744	5,781,345	1,344,814	4,579,183	247,127	2,060,516	1,060,758
1987	15,711,380	6,143,772	1,398,147	4,521,971	281,649	2,239,643	1,126,198
1988	16,544,183	6,645,046	1,457,764	4,620,840	313,179	2,346,332	1,161,021
1989	17,254,229	6,970,125	1,516,339	4,655,862	313,100	2,531,733	1,267,071
1990	18,204,899	7,371,403	1,566,210	4,742,450	357,357	2,808,349	1,359,130

Table 3.3.2

ADJUSTED WAGES BY LAND USE ACTIVITIES
Annual wages adjusted by inflation (CPI 1982-84=100) in \$1,000
1976-1990

YEAR	TOTAL	OFFICE	RETAIL	INDUSTRIAL	HOTEL	CULTURAL/ INSTITUTIONAL	GOVERNMENT
1976	9,680,365	2,601,383	957,189	4,296,376	162,086	1,046,458	616,873
1977	10,743,292	2,987,255	1,090,765	4,517,735	157,499	1,160,399	829,639
1978	11,686,501	3,158,144	1,114,563	4,544,957	167,947	1,546,048	1,154,843
1979	12,004,748	3,502,058	1,137,262	4,563,460	178,328	1,506,454	1,117,186
1980	11,953,618	3,508,007	1,287,504	4,552,422	156,885	1,391,755	1,057,045
1981	11,891,776	3,644,222	1,252,397	4,490,592	153,923	1,407,967	942,675
1982	12,009,958	3,829,686	1,024,975	4,528,392	175,908	1,533,158	917,838
1983	12,630,761	4,577,295	1,083,093	4,232,216	190,106	1,662,064	885,986
1984	12,797,599	4,628,211	1,119,081	4,235,484	210,942	1,676,458	927,423
1985	13,097,258	4,813,250	1,158,645	4,189,924	211,046	1,763,801	960,592
1986	13,506,939	5,180,417	1,205,031	4,103,211	221,440	1,846,341	950,500
1987	13,614,714	5,323,892	1,211,566	3,918,519	244,063	1,940,765	975,908
1988	13,729,613	5,514,561	1,209,763	3,834,722	259,900	1,947,164	963,503
1989	13,650,498	5,514,340	1,199,635	3,683,435	247,706	2,002,953	1,002,429
1990	13,781,150	5,580,169	1,185,624	3,590,046	270,520	2,125,927	1,028,864

Source : Department of City Planning
Employment Development Department

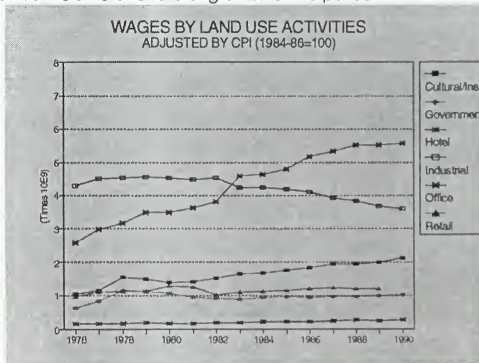
These data have been grouped by Land Use Activities (See Introduction, Data formats) as Office, Retail, Industrial, Hotel, Cultural/Institutional, and Government. This is the same Land Use Activity classification used to organize employment and establishment data. Annual wage data are presented in four tables: in current dollars, dollars adjusted for inflation, in percentage distribution by Land Use Activities, and percentage change over time.

In 1990, the total annual wage for the city in current dollars reached \$18.2 billion, which is twice the 1980 amount and three times the 1976 amount, in unadjusted dollars. There was an overall increase in all Activities for the 1976-1990 period that went from 100 to 400 percent, also in terms of unadjusted dollars.

The second table, showing dollar figures adjusted by inflation, describes changes over time more meaningfully than the previous table. Wages were adjusted based on the Consumer Price Index (CPI) from US Department of Labor, Bureau of Labor Statistics. This CPI corresponds to the designated reference date 1982-84 for the San Francisco-Oakland-San Jose area for all urban consumers. Adjusted figures show a total wage increase of 42% from 1976 to 1990. While there is a significant increase within Office Activity, the Industrial Activity, which had the highest total wages in 1976 shows a steady decline in adjusted wages from 1982 to 1990. In spite of this decline, Industrial Activity still represented the second largest wage group in 1990. Cultural/Institutional Activities are the third largest wage group with a similar pace of growth as the Office Activity. Retail and Government Activities show a similar volume and rate of growth for the period.

The Consumer Price Index (CPI) is a measure of the average change in prices over time in a fixed market basket of goods and services. The CPI is based on prices of food, clothing, shelter, and fuels, transportation fares, charges for doctors and dentists services, drugs, and the other goods that people buy for day-to-day living. The indexes used for adjustment measure price change from the designated reference date < 1982-84, which equals 100.

Graph 3.3.1



Source:

Department of City Planning
Employment Development Department

Table 3.3.3

WAGES BY LAND USE ACTIVITIES
 Percentage distribution of annual wages by Land Use Activities
 1976-1990

YEAR	TOTAL	OFFICE	RETAIL	INDUSTRIAL	HOTEL	CULTURAL/ INSTITUTNL	GOV'T
1976	100	27	10	44	2	11	6
1977	100	28	10	42	1	11	8
1978	100	27	10	39	1	13	10
1979	100	29	9	38	1	13	9
1980	100	29	11	38	1	12	9
1981	100	31	11	38	1	12	8
1982	100	32	9	38	1	13	8
1983	100	36	9	34	2	13	7
1984	100	36	9	33	2	13	7
1985	100	37	9	32	2	13	7
1986	100	38	9	30	2	14	7
1987	100	39	9	29	2	14	7
1988	100	40	9	28	2	14	7
1989	100	40	9	27	2	15	7
1990	100	40	9	26	2	15	7

Table 3.3.4

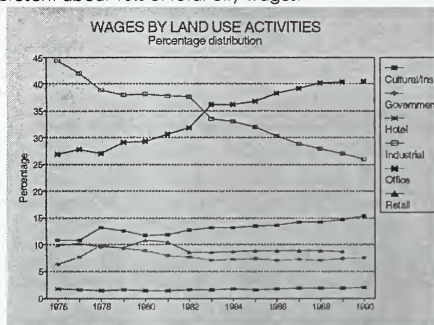
WAGES BY LAND USE ACTIVITIES
 Percentage change of annual wages adjusted by Inflation (CPI 1982-84=100)
 1976-1990

YEAR	TOTAL	OFFICE	RETAIL	INDUSTRIAL	HOTEL	CULTURAL/ INSTITUTNL	GOV'T
1976-77	11	15	14	5	-3	11	34
1977-78	9	6	2	1	7	33	39
1978-79	3	11	2	0	6	-3	-3
1979-80	-0	0	13	-0	-12	-8	-5
1980-81	-1	4	-3	-1	-2	1	-11
1981-82	1	5	-18	1	14	9	-3
1982-83	5	20	6	-7	8	8	-3
1983-84	1	1	3	0	11	1	5
1984-85	2	4	4	-1	0	5	4
1985-86	3	8	4	-2	5	5	-1
1986-87	1	3	1	-5	10	5	3
1987-88	1	4	-0	-2	6	0	-1
1988-89	-1	0	-1	-4	-5	3	4
1989-90	1	1	-1	-3	9	6	3
1976-90	42	115	24	-16	67	103	67

Source: Department of City Planning
 Employment Development Department

Looking at the wage distribution among Land Use Activities from the third table, there are significant changes between 1976 and 1990. In 1976, Industrial Activity represented 44% of total city wages. This dropped to 26% in 1990. The opposite trend occurred in Office Activity, which increased from 27% of total wages in 1976 to 40% in 1990. Cultural/Institutional Activities also show an increase during this period, going from 11% to 15% of total wages.

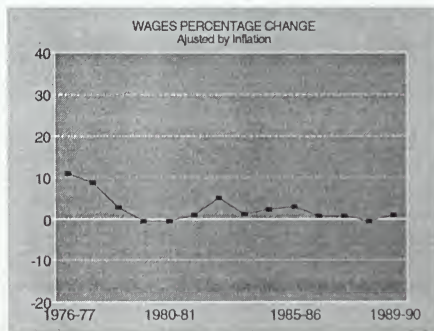
Government and Hotel Activities increased their shares of total wages much less dramatically, going from 6% and 1.7% of total wages in 1976, respectively, to 7% and 2% in 1990. The share of total wages earned in the Retail sector decreased slightly from 10% to 9%. These last three activities together represent about 18% of total City wages.



Graph 3.3.2

Source:

Department of City Planning
Employment Development Department



Graph 3.3.3

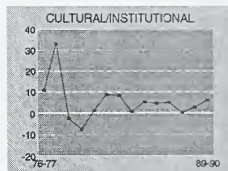
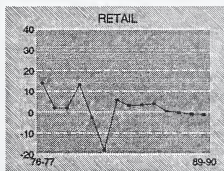
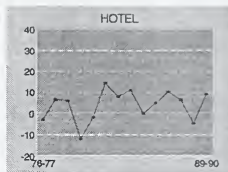
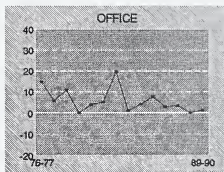
Source:

Department of City Planning
Employment Development Department

Graph 3.3.4

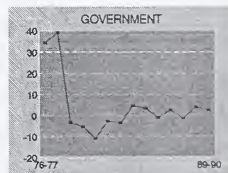
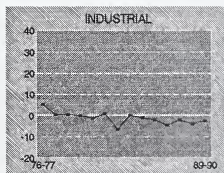
**PERCENTAGE CHANGE OF
ANNUAL WAGES ADJUSTED
BY INFLATION**

(CPI 1982-84=100)



Source:

Department of City Planning
Employment Development
Department



3.3.1.2 BUREAU OF ECONOMIC ANALYSIS DATA

The second set of data is published annually by the Regional Economic Measurement Division of the Bureau of Economic Analysis (BEA). It has the advantage of including earnings from self-employed persons which are not included in the EDD'S wage and salary data above. The personal income data do not contain enough description of the type of employment to use the Land Use Activity classifications developed for this inventory and used elsewhere in this report.

The BEA defines Personal income as the sum of wage and salary disbursements, other labor income, proprietors' income, rental income of persons, personal dividend income, personal interest income, and transfer payments, less personal contributions for social insurance. Included here is a subset of that personal income data, "personal income by place of work," which includes wage and salary income, other labor income, and proprietors' income only. The income data are reported by employing establishments. Data about proprietors are reported by tax-filing address, which is the place of residence of the proprietor. The BEA assumes that this is also the place of work. However this may not always be the case, particularly in San Francisco where self-employed people (including some who do not live in San Francisco) may be likely to work outside of their home.

These data are presented under two categories: by earning type and by industry group. Four tables are presented for each category following the previous format, current dollars, dollars adjusted for inflation, percentage distribution by industry group, and percentage change over time.

The total volume of earnings in 1989 (in 1989 dollars) was \$22.9 billion. This was an increase of about \$10 billion (unadjusted for inflation) from 1981. In adjusted dollars (1982-84=100), the total earnings in 1989 was \$18.1 billion (1982 dollars). This was an increase of \$3.1 billion, or 21%, from 1981. The years 1983 and 1989 showed the greatest increases. The largest increase was within services, where income grew by 69% during this period.

The proportion of income coming from wages and salaries has decreased over time, while the percentage of income earned by the self-employed has increased. In 1981, 88% of this income was from wages and salaries, while 7% was from proprietors' income. In 1989 over 80% was from wages and salaries and 12% was from proprietors' income. The growth in wages and salaries was relatively constant, ranging from increases of about 6% in 1982 and 1989 to a loss of 4% in 1988.

Proprietors' income has been much more volatile; the largest increase was 33% in 1983, and declines occurred in two years, the largest being 11% in 1982.

Tables 3.3.6 through 3.3.9 describe income distribution by main industry groups (SIC) with sub-categories for manufacturing and government. Through the 1980s, San Francisco workers

Table 3.3.5 PERSONAL INCOME BY PLACE OF WORK BY EARNING TYPE

Earnings In \$1,000 1981-1989									
	1981	1982	1983	1984	1985	1986	1987	1988	1989
Wages and Salaries	11,517,526	12,420,176	13,277,476	14,200,425	15,112,860	16,052,893	16,613,259	16,660,443	18,526,919
Other labor income	1,125,502	1,306,132	1,389,133	1,417,431	1,416,706	1,482,527	1,503,498	1,487,016	1,638,962
Proprietors' Income	1,009,270	962,011	1,290,144	1,514,831	1,794,484	1,987,869	2,260,448	2,337,818	2,740,556
TOTAL	13,652,298	14,688,319	15,956,753	17,132,687	18,324,050	19,523,289	20,377,205	20,485,277	22,906,439

Earnings adjusted by inflation (CPI 1982=100) In \$1,000
1981-1989

	1981	1982	1983	1984	1985	1986	1987	1988	1989
Wages and Salaries	12,684,500	12,725,590	13,493,370	13,654,255	13,941,753	14,384,313	14,396,238	13,826,094	14,657,373
Other labor income	1,239,540	1,338,250	1,411,721	1,362,914	1,306,924	1,328,429	1,302,858	1,234,038	1,296,647
Proprietors' Income	1,111,531	985,667	1,311,122	1,456,568	1,655,428	1,781,245	1,958,794	1,940,098	2,168,163
TOTAL	15,035,570	15,049,507	16,216,212	16,473,738	16,904,105	17,493,987	17,657,890	17,000,230	18,122,183

Percentage distribution by earning type
1981-1989

	1981	1982	1983	1984	1985	1986	1987	1988	1989
Wages and Salaries	84	85	83	83	82	82	82	81	81
Other labor income	8	9	9	8	8	8	7	7	7
Proprietors' Income	7	7	8	9	10	10	11	11	12
TOTAL	100	100	100	100	100	100	100	100	100

Percentage change of earnings adjusted by inflation (CPI 1982=100)
1981-1989

	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87	1987-88	1988-89	1981-89
Wages and Salaries	0	6	1	2	3	0	-4	6	16
Other labor income	8	5	-3	-4	2	-2	-5	5	5
Proprietors' Income	-11	33	11	14	8	10	-1	12	95
TOTAL	0	8	2	3	3	1	-4	7	21

Source: Department of City Planning
US Department of Commerce, Bureau of Economic Analysis

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Earnings in \$1,000
1981-1989

Table 3.3.6

	1981	1982	1983	1984	1985	1986	1987	1988	1989
Agricultural	21,211	21,330	26,193	28,380	29,151	30,466	38,069	37,923	42,259
Mining	170,670	169,766	200,710	187,687	201,294	132,009	96,366	100,152	90,708
Construction	865,205	1,027,534	648,819	657,655	707,479	792,924	858,520	853,734	826,422
Manufacturing	1,253,979	1,349,979	1,380,836	1,422,562	1,363,166	1,382,408	1,423,612	1,428,023	1,520,465
Nondurable	926,499	1,027,408	1,073,972	1,089,315	1,035,479	1,090,436	1,111,296	1,116,078	1,203,708
Durable	327,480	322,571	306,864	333,247	327,687	291,972	312,316	311,945	316,757
Transp. & P.U.	1,592,653	1,662,843	1,782,861	1,843,325	1,882,551	1,788,367	1,688,492	1,705,049	1,727,506
Wholesale	1,093,065	1,096,872	1,087,295	1,254,882	1,346,191	1,430,041	1,318,020	1,331,520	1,459,056
Retail trade	1,019,720	1,072,691	1,160,556	1,230,815	1,319,546	1,427,008	1,491,858	1,488,654	1,662,173
F.I.R.E.	2,179,204	2,350,933	2,744,241	2,887,567	3,206,712	3,689,206	3,870,688	3,984,959	4,183,808
Services	3,452,486	3,823,734	4,665,771	5,175,007	5,619,825	6,115,079	6,662,501	7,375,622	8,127,590
Government	2,004,105	2,112,637	2,259,471	2,444,807	2,648,135	2,735,781	2,928,779	2,924,560	3,264,452
Federal	701,268	715,243	768,797	818,890	856,340	844,739	867,755	665,445	960,855
Military	127,171	145,005	150,167	156,247	159,112	159,663	161,537	161,190	147,378
State & local	1,175,646	1,252,389	1,340,507	1,469,670	1,632,683	1,731,379	1,899,487	1,897,925	2,156,221
TOTAL	13,652,298	14,688,319	15,956,753	17,132,687	18,324,050	19,523,289	20,377,205	21,606,960	22,906,439

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Earnings adjusted by Inflation (CPI 1982=100) in \$1,000
1981-1989

Table 3.3.7

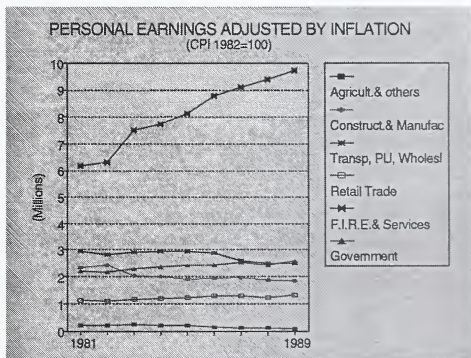
	1981	1982	1983	1984	1985	1986	1987	1988	1989
Agricultural	23,360	21,855	26,619	27,288	26,892	27,299	32,989	31,471	33,433
Mining	187,963	173,941	203,974	180,468	185,696	118,288	83,506	83,114	71,763
Construction	952,869	1,052,801	659,369	632,361	652,656	710,505	743,951	708,493	653,816
Manufacturing	1,381,034	1,383,175	1,403,289	1,367,848	1,257,533	1,238,717	1,233,633	1,185,081	1,202,900
Nondurable	1,020,373	1,052,672	1,091,435	1,047,418	955,239	977,093	962,995	926,206	952,301
Durable	360,661	330,503	311,854	320,430	302,294	261,624	270,638	258,876	250,599
Transp. & P.U.	1,754,023	1,703,733	1,811,851	1,772,428	1,736,671	1,602,479	1,463,165	1,414,978	1,366,698
Wholesale	1,203,816	1,123,844	1,104,975	1,206,617	1,241,874	1,281,399	1,142,132	1,104,996	1,154,316
Retail trade	1,123,040	1,099,069	1,179,427	1,183,476	1,217,293	1,278,681	1,292,771	1,235,398	1,315,010
F.I.R.E.	2,400,004	2,408,743	2,788,863	2,776,507	2,958,221	3,305,740	3,354,149	3,307,020	3,309,975
Services	3,802,297	3,917,760	4,741,637	4,975,968	5,184,340	5,479,461	5,773,398	6,120,848	6,430,055
Government	2,207,164	2,164,587	2,296,210	2,350,776	2,442,929	2,451,417	2,537,937	2,427,021	2,582,636
Federal	772,322	732,831	781,298	787,394	789,982	766,935	751,954	652,237	760,170
Military	140,056	148,571	152,609	150,238	146,782	143,067	139,980	133,768	116,597
State & local	1,294,764	1,283,185	1,362,304	1,413,144	1,506,165	1,561,415	1,646,003	1,575,041	1,706,871
TOTAL	15,035,570	15,049,507	16,216,212	16,473,738	16,904,105	17,493,987	17,657,890	17,931,087	18,122,183

Source: Department of City Planning
US Department of Commerce, Bureau of Economic Analysis

have increasingly earned larger proportions of their total income in a few Industries. In 1989, the largest Industries were services (36%) and F.I.R.E. (18%). These were also the largest Industries from 1981 but represented smaller percentages of total income: services represented 25% and F.I.R.E. 16% of total income.

The shares of total income derived from the construction, manufacturing, transportation/utilities, and wholesale trade sectors declined from 1981 to 1989. Although the share of total income from government employment remained fairly stable, federal employment (both civilian and military) declined while state and local employment income increased.

Graph 3.3.5



Source:

Department of City
Planning
U.S. Department of
Commerce, Bureau
of Economic Analysis

PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Percentage distribution by industry group
1981-1989

Table 3.3.8

	1981	1982	1983	1984	1985	1986	1987	1988	1989
Agricultural	0	0	0	0	0	0	0	0	0
Mining	1	1	1	1	1	1	0	0	0
Construction	6	7	4	4	4	4	4	4	4
Manufacturing	9	9	9	8	7	7	7	7	7
Nondurable	7	7	7	6	6	6	5	5	5
Durable	2	2	2	2	2	2	2	1	1
Transp. & P.U.	12	11	11	11	10	9	8	8	8
Wholesale	8	7	7	7	7	7	6	6	6
Retail trade	7	7	7	7	7	7	7	7	7
F.I.R.E.	16	16	17	17	18	19	19	18	18
Services	25	26	29	30	31	31	33	34	35
Government	15	14	14	14	14	14	14	14	14
Federal	5	5	5	5	5	4	4	3	4
Military	1	1	1	1	1	1	1	1	1
State & local	9	9	8	9	9	9	9	9	9
TOTAL	100	100	100	100	100	100	100	100	100

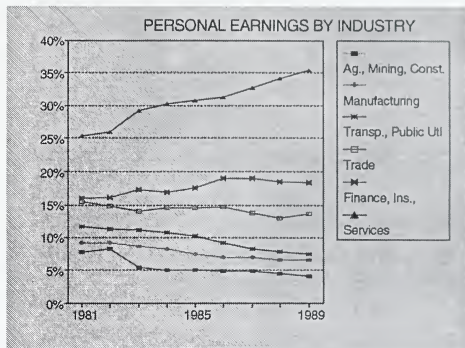
PERSONAL INCOME BY PLACE OF WORK BY INDUSTRY GROUP
Percentage change of earnings adjusted by inflation (CPI 1982=100)
1981-1989

Table 3.3.9

	1981-82	1982-83	1983-84	1984-85	1985-86	1986-87	1987-88	1988-89	1981-89
Agricultural	-6	22	3	-1	2	21	-5	6	43
Mining	-7	17	-12	3	-36	-29	-0	-14	-62
Construction	10	-37	-4	3	9	5	-5	-8	-31
Manufacturing	0	1	-3	-8	-2	-0	-4	2	-13
Nondurable	3	4	-4	-9	2	-1	-4	3	-7
Durable	-8	-6	3	-6	-13	3	-4	-3	-31
Transp. & P.U.	-3	6	-2	-2	-8	-9	-3	-3	-22
Wholesale	-7	-2	9	3	3	-11	-3	4	-4
Retail trade	-2	7	0	3	5	1	-4	6	17
F.I.R.E.	0	16	-0	7	12	1	-1	0	38
Services	3	21	5	4	6	5	6	5	69
Government	-2	6	2	4	0	4	-4	6	17
Federal	-5	7	1	0	-4	-1	-27	38	-2
Military	6	3	-2	-2	-3	-2	-4	-13	-17
State & local	-1	6	4	7	3	6	-4	8	32
TOTAL	0	8	2	3	3	1	2	1	21

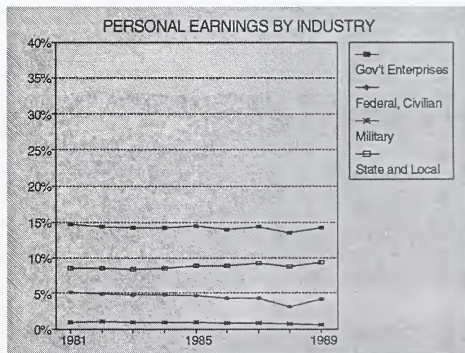
Source: Department of City Planning
US Department of Commerce, Bureau of Economic Analysis

Graph 3.3.5



Source:

Department of City
Planning
U.S. Department of
Commerce, Bureau of
Economic Analysis



3.3.2 BUSINESS REVENUES

This section contains two data sets. The U.S. Department of Commerce, Bureau of the Census conducts economic censuses every five years, covering the years ending in "2" and "7." This program collects information about firms and establishments engaged in providing goods and services. The following tables, Tables 3.3.10 through 3.3.18, present some of these data for 1982 and 1987, from the censuses of manufactures, service industries, retail trade, and wholesale trade. These data are presented by Standard Industrial Classification (SIC) Code, which is describe in Data Formats Section, page 6. This inventory generally uses two and three digit SICs.

Additional information about retail trade is provided by data on taxable sales provided by the State of California Board of Equalization and shown in Table 3.3.19. These two data sources also contain useful information about the number of establishments and employees, but in this inventory, we are emphasizing the business revenues element of these data sets.

3.3.2.1 Manufacturing Revenues

Manufacturing is a component of Industrial Activity, according to the Land Use Activity classification defined for this inventory. The census of manufactures covers establishments engaged in the mechanical or chemical transformation of materials or substances into new products. It includes SIC codes 20 through 39. All of these SIC codes with establishments in San Francisco are included in Tables 3.3.10 through 3.3.18. Auxiliary establishments are those where employees are primarily engaged in support services for other establishments of the same company, such as administrative functions, central warehouse, research, or testing.

Table 3.3.10 shows that in 1982, there were about 1500 manufacturing establishments, with about 51,000 employees. Eighty-one of these establishments were auxiliary establishments which produced nothing on their own. San Francisco manufacturing establishments shipped merchandise worth about \$3.1 billion (1982 dollars). Three industries, Food, Apparel, and Printing accounted for 73% of the value of merchandise shipped. No other industry accounted for more than 9% of the value of merchandise shipped.

In 1987, the number of manufacturing establishments had increased from 1500 to 1600, but their employees decreased

Table 3.3.10

MANUFACTURES, PAYROLL EMPLOYER STATISTICS 1982

SIC	INDUSTRIES	ESTAB.	EMPLOYEES (1,000s)	VALUE ADDED BY MANUFACTURE (\$million)	VALUE OF SHIPMENTS (\$million)
20	Food & Kindred Products	115	3.7	268.3	787.8
22	Apparel & Other Textile Products	424	10.0	385.7	794.8
24	Lumber & Wood Products	41	0.5	12.6	27.2
25	Furniture & Fixtures	50	1.0	31.9	53.3
26	Paper and allied products	18	0.5	11.7	23.2
27	Printing & Publishing	415	9.7	388.3	668.6
28	Chemicals & Allied Products	28	0.5	50	102.2
34	Fabricated Metal Products	85	1.7	84.1	153.4
35	Industrial Machinery & Equipment	71	1.3	47.7	84.1
36	Electronic & Electric Equipment	52	1.8	64.4	103.2
37	Transportation Equipment	30	2.7	149.4	247.6
39	Misc. Manufacturing Industries	89	1.0	25.1	47.5
	Auxiliaries	81	16.6		
TOTAL		1499	51.0	1519.20	3092.90

MANUFACTURES, PAYROLL EMPLOYER STATISTICS, 1982

Percentage Distribution by Industry Group

SIC	INDUSTRIES	ESTAB.	EMPLOYEES (1,000s)	VALUE ADDED BY MANUFACTURE	VALUE OF SHIPMENTS
20	Food & Kindred Products	8	7	18	25
22	Apparel & Other Textile Products	28	20	25	26
24	Lumber & Wood Products	3	1	1	1
25	Furniture & Fixtures	3	2	2	2
26	Paper & allied products	1	1	1	1
27	Printing & Publishing	28	19	26	22
28	Chemicals & Allied Products	2	1	3	3
34	Fabricated Metal Products	6	3	6	5
35	Industrial Machinery & Equipment	5	3	3	3
36	Electronic & Electric Equipment	3	4	4	3
37	Transportation Equipment	2	5	10	8
39	Misc. Manufacturing Industries	6	2	2	2
	Auxiliaries	5	33	0	0
TOTAL		100	100	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

In number from 51,000 to 41,100. The total value of merchandise shipped rose to \$4.5 billion (1987 dollars). Food, Apparel and Printing remained the largest three industries in terms of value of merchandise, totalling 75% of the total. The share of the total value shipped by Food and by Apparel shrank over the five years, while the share of the total shipped by Printing establishments increased from 22% of the total in 1982 to 39% of the total in 1987.

SIC	INDUSTRIES	ESTAB.	EMPLOYEES (1,000s)	VALUE ADDED BY MANUFACTURE (\$million)	VALUE OF SHIPMENTS (\$million)
20	Food & Kindred Products	107	2.9	319.8	629.7
22	Apparel & Other Textile Products	414	10.4	333.6	983.5
24	Lumber & Wood Products	50	0.7	33	64.7
25	Furniture & Fixtures	56	1.2	52.5	80
27	Printing & Publishing	461	10.5	1304.3	1728.7
28	Chemicals & Allied Products	28	—	—	—
30	Rubber & Misc. Plastics Products	23	0.5	27.2	51.5
34	Fabricated Metal Products	102	2.2	119.4	233.6
35	Industrial Machinery & Equipment	71	1.1	53.6	99.4
36	Electronic & Other Electric Equipment	73	3	160.7	254.9
37	Transportation Equipment	31	2.1	128	207.7
38	Instruments & Related Products	37	—	—	—
39	Misc. Manufacturing Industries	97	0.9	37.3	66.3
	Auxiliaries	64	5.6	—	—
TOTAL		1614	41.10	2606.70	4466.30

MANUFACTURES, PAYROLL EMPLOYER STATISTICS, 1987

Percentage distribution by Industry Groups

SIC	INDUSTRIES	ESTAB.	EMPLOYEES (1,000s)	VALUE ADDED BY MANUFACTURE	VALUE OF SHIPMENTS
20	Food & Kindred Products	7	7	12	14
22	Apparel & Other Textile Products	26	25	13	22
24	Lumber & Wood Products	3	2	1	1
25	Furniture & Fixtures	3	3	2	2
27	Printing & Publishing	29	26	50	39
28	Chemicals & Allied Products	2	—	—	—
30	Rubber & Misc. Plastics Products	1	1	1	1
34	Fabricated Metal Products	6	5	5	5
35	Industrial Machinery & Equipment	4	3	2	2
36	Electronic & Other Electric Equipment	5	7	6	6
37	Transportation Equipment	2	5	5	5
38	Instruments & Related Products	2	—	—	—
39	Misc. Manufacturing Industries	6	2	1	1
	Auxiliaries	4	14	—	—
TOTAL		100	100	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

3.3.2.2 Service Industry Revenue

Data from the Census of Service Industries is shown on Tables 3.3.12 to 3.3.14. Service establishments with payrolls are described in Tables 3.3.12 and 3.3.13, while those without payrolls (generally sole proprietorships) are described in Table 3.3.14.

In 1982 there were about 8,200 establishments which employed about 101,000 people and had annual receipts of \$4.9

Table 3.3.12 SERVICE INDUSTRIES, PAYROLL EMPLOYER STATISTICS, 1982

SIC	INDUSTRIES	ESTAB.	RECEIPTS (\$1,000)	PAID EMPLOYEES FOR PAY PERIOD INCLUDING 3/12
70	Hotels, Rooming Houses, Etc	254	544,837	13,192
72	Personal Services	660	127,879	4,75
73	Business Services	1,858	1402,254	38,238
75	Automotive Repair, Services Etc	496	224,835	3,006
76	Miscellaneous Repair Services	177	41,755	865
78,79,84	Amusement and Recreation Services	363	314,764	4,249
80	Health Services	2,055	499,977	9,854
81	Legal Services	1,354	793,578	11,234
823,4,9	Selected Educational Services	83	32,792	913
891	Engr., Arch. & Surveying Services	415	668,912	9,156
893	Acc., Auditing, & Bkeeping Services	352	235,252	3,905
83,892,9	Social & Other Services	161	37,692	1,144
TOTAL		8,228	4,924,527	100,531

SERVICE INDUSTRIES PAYROLL EMPLOYER STATISTICS, 1982
Percentage distribution by Industry Groups

SIC	INDUSTRIES	ESTAB.	RECEIPTS	PAID EMPLOYEES FOR PAY PERIOD INCLUDING 3/12
70	Hotels, Rooming Houses, Etc	3	11	13
72	Personal Services	8	3	5
73	Business Services	23	28	38
75	Automotive Repair, Services Etc	6	5	3
76	Miscellaneous Repair Services	2	1	1
78,79,84	Amusement and Recreation Services	4	6	4
80	Health Services	25	10	10
81	Legal Services	16	16	11
823,4,9	Selected Educational Services	1	1	1
891	Engr., Arch. & Surveying Services	5	14	9
893	Acc., Auditing, & Bkeeping Services	4	5	4
83,892,9	Social & Other Services	2	1	1
TOTAL		100	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

Table 3.3.13

	BUSINESS	ESTAB.	RECEIPTS (\$1,000)	EMPLOYMENT
70	Hotels, Rooming Houses, Etc	290	794,619	16,667
72	Personal Services	793	17,527	6,895
73	Business Services	2,145	1,941,982	42,055
731	Advertising	218	288,442	3,102
732	Consumer Credit	27	17,527	402
733	Mailing, Repro, Comm. Art, Etc	379	248,437	3,531
733.6	Comm. Photography, Etc	233	126,753	1,198
734	Servs to Dwelling and Other Bldgs	160	141,844	5,378
735	Misc Equip Rntl And Leasing	111	169,244	1,413
736	Personnel Supply Svcs	279	239,104	14,513
737	Comp Prog, Data Proc., Etc	428	495,398	4,735
738	Misc Business Svcs	543	341,986	8,981
75	Auto Repair Svcs And Repair	605	473,082	4,172
76	Misc Repair Svcs	197	67,969	1,030
78,79,84	Amusement And Rec Svcs	473	442,327	5,799
80	Health Services	2,251	829,409	12,893
81	Legal Services	1,631	1,706,551	16,906
823	Selected Educational Svcs	107	56,356	1,417
86	Social Services	180	33,872	1,367
87	Eng, Acct, Research Mgmt	1,742	2,221,806	29,678
871	Eng Architectural Svcs	541	1,065,018	14,350
872	Acct, Aud., And Bkpg Svcs	471	449,480	5,567
873	Resrch Devl Testing Serv	106	87,644	1,168
874	Mgmt And Pub Relation Svcs	624	619,664	8,593
89	Servics N.E.C.	124	47,962	723
	TOTAL	10,538	8,794,462	139,602

SERVICE INDUSTRIES, PAYROLL EMPLOYER STATISTICS, 1987
Percentage distribution by Industry Group

	BUSINESS	ESTAB.	RECEIPTS (\$1,000)	EMPLOYMENT
70	Hotels, Rooming Houses, Etc	3	9	12
72	Personal Services	8	2	5
73	Business Services	20	22	30
731	Advertising	2	3	2
732	Consumer Credit	0	0	0
733	Mailing, Repro, Comm. Art, Etc	4	3	3
733.6	Comm. Photography, Etc	2	1	1
734	Servs to Dwelling and Other Bldgs	2	2	4
735	Misc Equip Rntl And Leasing	1	2	1
736	Personnel Supply Svcs	3	3	10
737	Comp Prog, Data Proc., Etc	4	6	3
738	Misc Business Svcs	5	4	6
75	Auto Repair Svcs And Repair	6	5	3
76	Misc Repair Svcs	2	1	1
78,79,84	Amusement And Rec Svcs	4	5	4
80	Health Services	21	9	9
81	Legal Services	15	19	12
823	Selected Educational Svcs	1	1	1
86	Social Services	2	0	1
87	Eng, Acct, Research Mgmt	17	25	21
871	Eng Architectural Svcs	5	12	10
872	Acct, Aud., And Bkpg Svcs	4	5	4
873	Resrch Devl Testing Serv	1	1	1
874	Mgmt And Pub Relation Svcs	6	7	6
89	Servics N.E.C.	1	1	1
	TOTAL	100	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

billion (1982 dollars). The Industry groups with the highest percentages of the total services receipts were Business Services (28%), Legal Services (16%), and Engineering, architecture and surveying (14%).

The 1987 data shown on Table 3.3.13 show industry groups in more detail than was shown for 1982. Some of the SIC codes changed between 1982 and 1987, notably Engineering and Accounting, making comparisons imprecise. In 1987 there were about 10,500 establishments which employed about 140,000 people and had annual receipts of \$8.8 billion (1987 dollars). The industry groups with the highest percentages of total services receipts were Engineering, accounting, research, management (25%), Business Services (22%), and Legal Services (19%).

Table 3.3.14 shows service establishments with no employees, generally sole proprietorships. In 1987, there were about 26,000 such establishments with receipts of \$715 million. Twenty-nine percent of these establishments provided Business services, and 17% provided Engineering, accounting, research, management services.

Table 3.3.14

SERVICE INDUSTRIES, NON EMPLOYER STATISTICS, 1987

SIC	INDUSTRIES	ESTAB. RECEIPTS		ESTAB. RECEIPTS	
		(Number)	(\$1000)	Percent	Percent
70	Hotels, Rooming Houses, Etc	0	15,728	0	2
72	Personal Services	3,967	86,476	15	12
73	Business Services	7,661	185,606	29	26
75	Automotive Repair, Services Etc	318	15,008	1	2
76	Miscellaneous Repair Services	393	9,850	2	1
78,79,84	Amusement And Recreation Services	2,539	52,744	10	7
80	Health Services	2,775	107,771	11	15
81	Legal Services	1,358	57,827	5	8
823,4,9	Selected Educational Services	741	9,544	3	1
83	Social Services	789	12,225	3	2
87	Eng., Acct., Resrch., Mgmt Svs	4,532	115,171	17	16
89	Service n.e.c.	1,017	46,693	4	7
TOTAL		26,090	714,643	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

3.3.2.3 Wholesale Trade Revenues

Tables 3.3.15 and 3.3.16 describe wholesale trade establishments in 1982 and 1987. In 1982 there were 2,000 wholesale establishments with 23,000 employees and annual sales of \$13.4 billion. Fifty-six percent of these establishments dealt with durable goods, and the remaining 44% with nondurable goods. Forty-seven percent of the sales volume was generated by establishments dealing in durable goods, and 53% by establishments dealing in nondurable goods.

By 1987, the number of establishments had increased to 2,300, the number of employees to 28,000, and the annual sales to \$13.9 billion (1987 dollars). The distribution of establishments between durable and nondurable goods remained similar. However, the share of annual sales generated by establishments which deal in durable goods increased from 47% to 53%, while the share generated by establishments which deal in nondurable goods decreased from 53% to 47%.

WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1982

SIC	INDUSTRIES	ESTAB.	SALES (\$1,000)	EMPLOYMENT
50	Durable goods	1,137	6,248,243	13,274
51	Nondurable goods	891	7,177,392	10,128
TOTAL		2,028	13,425,635	23,402

Table 3.3.15

WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1982
Percentage distribution by Industry Groups

SIC	INDUSTRIES	ESTAB.	SALES	EMPLOYMENT
50	Durable goods	56	47	57
51	Nondurable goods	44	53	43
TOTAL		100	100	100

WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1987

SIC	INDUSTRIES	ESTAB.	SALES (\$1,000)	EMPLOYMENT
50	Durable goods	1,299	7,441,156	16,257
51	Nondurable goods	958	6,502,276	11,874
TOTAL		2,257	13,943,432	28,131

Table 3.3.16

WHOLESALE TRADE, PAYROLL EMPLOYER STATISTICS, 1987
Percentage distribution by Industry Groups

SIC	INDUSTRIES	ESTAB.	SALES	EMPLOYMENT
50	Durable goods	58	53	58
51	Nondurable goods	42	47	42
TOTAL		100	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

3.3.2.4 Retail Trade Revenues

Tables 3.3.17 and 3.3.18 describe retail trade establishments with employees in 1982 and 1987. Table 3.3.19 describes sales tax permits and taxable sales in 1990.

In 1982 there were 5,900 retail establishments with 60,000 employees and annual sales of \$4 billion (1982 dollars). Two categories of establishments, Eating and drinking places and Food stores, each commanded 19% of the total sales.

In 1987 there were 6,900 retail establishments with 75,000 employees and annual sales of \$5.5 billion (1987 dollars). By 1987 Eating and drinking establishments had increased their share of the total retail sales to 20%, and the share captured by Food stores declined to 18%.

Table 3.3.17

RETAIL, PAYROLL EMPLOYER STATISTICS, 1982

SIC	Business	ESTAB.	SALES (\$1,000)	EMPLOYMENT
52	Building materials, hardware, garden	100	99,694	947
53	General merchandise group stores	87	420,935	4,757
54	Food stores	817	790,841	7,157
55 ex. 554	Automotive dealers	110	454,344	2,154
554	Gasoline service stations	234	218,574	1,673
56	Apparel and accessory stores	609	374,055	5,100
57	Furniture, home furnishings & equip.	381	199,599	1,963
58	Eating and drinking places	2,090	792,607	27,356
591	Drug and proprietary stores	171	134,551	1,459
59 ex. 591	Miscellaneous retail stores	1,284	595,552	7,619
TOTAL		5,883	4,080,752	60,185

RETAIL, PAYROLL EMPLOYER STATISTICS, 1982

Percentage Distribution by Industry Groups

SIC	Business	ESTABLISH.	SALES	EMPLOYMENT
52	Building materials, hardware, garden	2	2	2
53	General merchandise group stores	1	10	8
54	Food stores	14	19	12
55 ex. 554	Automotive dealers	2	11	4
554	Gasoline service stations	4	5	3
56	Apparel and accessory stores	10	9	8
57	Furniture, home furnishings & equip.	6	5	3
58	Eating and drinking places	36	19	45
591	Drug and proprietary stores	3	3	2
59 ex. 591	Miscellaneous retail stores	22	15	13
TOTAL		100	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

SIC	Business	ESTAB.	SALES (\$1,000)	EMPLOYMENT
52	Building materials, hardware, garden	123	185,225	1,299
53	General merchandise group stores	72	573,818	4,982
54	Food stores	999	978,908	9,272
55 ex. 554	Automotive dealers	117	523,885	2,481
554	Gasoline service stations	192	205,324	1,515
56	Apparel and accessory stores	780	504,506	5,638
57	Furniture, home furnishings & equip.	439	323,583	2,941
58	Eating and drinking places	2,572	1,118,844	35,459
591	Drug and proprietary stores	156	202,445	1,670
59 ex. 591	Miscellaneous retail stores	1,434	896,449	9,476
TOTAL		6,884	5,512,987	74,733

RETAIL TRADE, PAYROLL EMPLOYER STATISTICS, 1987

Percentage Distribution by Industry Groups

SIC	Business	ESTAB.	SALES	EMPLOYMENT
52	Building materials, hardware, garden	2	3	2
53	General merchandise group stores	1	10	7
54	Food stores	15	18	12
55 ex. 554	Automotive dealers	2	10	3
554	Gasoline service stations	3	4	2
56	Apparel and accessory stores	11	9	8
57	Furniture, home furnishings & equip.	6	6	4
58	Eating and drinking places	37	20	47
591	Drug and proprietary stores	2	4	2
59 ex. 591	Miscellaneous retail stores	21	16	13
TOTAL		100	100	100

Source: Department of City Planning
U.S. Department of Commerce, Bureau of the Census

3.3.2.5 Taxable Sales

Sales tax permits are issued by the State of California Board of Equalization. The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property except those dealing solely in nontaxable commodities. Permits are tabulated twice a year, January 1 and July 1. Sales tax data show the volume of taxable sales only; they do not give any information on sales, such as food for home consumption, which are not subject to sales tax.

The Board of Equalization makes the following observations about these data:

"Total taxable transactions do not necessarily indicate the gross sales of stores dealing with taxable items. Only sales subject to sales tax are tabulated; excluded are sales for resale, sales of nontaxable items such as food for home consumption and prescription medicines, and taxable sales disclosed by board audits.

Some businesses dealing primarily in nontaxable activities, such as services, manufacturing, contracting, or wholesaling, either sell some merchandise that is subject to sales tax or use some items that were purchased ex-tax and on which use tax must be paid. Such transactions are included in the tabulations.

Data are compiled by type of store but cannot be broken down by commodity.

Business are classified by their principal line of merchandise or service."

In 1990, over 30,000 sales tax permits resulted in total taxable sales in San Francisco of \$8.6 billion. Of these total sales, 61% corresponded to retail stores, 9% to business and personal services, and 30% to other outlets. Business and personal services (business codes 70 to 73) include hotels, motels, repair shops, etc. "All Other Outlets" includes non-store retailers (mobile ice cream vendors, vending machines, sales by telephone); public utilities, government agencies, educational institutions, health services, construction contractors, wholesale stores, advertising agencies, real estate agencies, etc.

The types of retail stores with more than \$1 billion each in taxable transactions are specialty stores (office, store, and school supplies; jewelry; and others), and the eating and drinking group.

Type of Business	Permits	Taxable transactions (by \$1,000)
Apparel stores	1,145	575,246
General merchandise stores	142	669,667
Drug stores	145	138,807
Food stores	1,367	303,610
Packaged liquor stores	141	56,582
Eating and drinking places	3,191	1,098,935
Home furnishings and appliances	641	266,975
Building material and farm implements	208	209,887
Auto dealers and auto supplies	153	316,819
Service stations	178	301,088
Other retail stores	3,798	1,343,969
Retail Stores Totals	11,109	5,281,585
Business and Personal Service	3,438	731,385
All Other Outlets	15,569	2,583,484
Totals All Outlets	30,116	8,596,454

TAXABLE SALES AND SALES TAX PERMITS BY TYPE OF BUSINESS, 1990
 Percentage distribution by type of business

Type of Business	Permits	Taxable transactions
Apparel stores	10	11
General merchandise stores	1	13
Drug stores	1	3
Food stores	12	6
Packaged liquor stores	1	1
Eating and drinking places	29	21
Home furnishings and appliances	6	5
Building material and farm implements	2	4
Auto dealers and auto supplies	1	6
Service stations	2	6
Other retail stores	34	3
Retail Stores Totals	100	100

Source: Department of City Planning
 California State Board of Equalization

3.3.3 CITY REVENUES AND EXPENDITURES

The data in this section are from the *Comprehensive Annual Financial Report for the City and County of San Francisco*, prepared by the Office of the Controller.

These tables include data concerning the General Fund, Special Revenue Funds, and Debt Service Funds. The General Fund accounts for resources that are traditionally associated with governments and that are not required to be accounted for in another fund. Special Revenue Funds are used to account for the proceeds of specific revenue sources (other than expendable trusts or major capital projects) that are legally restricted to expenditures for specified purposes. Debt Service Funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal of general obligation and certain lease revenue bonds and related authorized costs.

Other City funds not included in these tables are Capital Project Funds, the Proprietary Funds which consist of enterprise and internal service funds and Fiduciary Funds which consist of pension trust and nonexpendable trust, expendable, and agency trust funds. These are funds whose uses are much more restricted than those which are included.

3.3.3.1 City Revenues

The Annual Financial Report for 1990 includes a table of General Revenues by Source, which shows a total revenue of \$1.5 billion. The major sources are property taxes (\$458 million), and grants and subventions (\$444 million). These two together represent more than 61 percent of the total revenues. The third and fourth largest are other local taxes (16 percent) and business taxes (10 percent). Charges for services; licenses, fines and penalties; interest and investment earnings; and other add the remaining 13 percent.

These revenue data adjusted by inflation (1981 dollar value) total \$1.035 billion for 1990, an increase of 25 percent since 1981. During this period, 1984 showed the only decline (9.2 percent), mainly due to a reduction of grants and subventions. Over the 1980s, grants and subventions have declined from 40 percent to 30 percent of the total budget. This decline has

Table 3.3.20

GENERAL REVENUES BY SOURCE-CONSTANT DOLLAR VALUE(1)(2)
1981-1990 Fiscal Years, (In \$1000)

Fiscal Year	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subventio	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
1981	186,415	58,773	125,872	329,786	28,872	33,192	58,230	1,385	822,525
1982	189,931	95,898	146,969	293,077	28,490	30,363	77,356	10,948	873,032
1983	211,856	91,544	129,540	274,673	27,465	45,529	86,689	9,338	876,634
1984	213,865	86,234	130,849	234,434	26,856	38,667	57,973	7,375	796,253
1985	239,026	79,535	141,367	244,295	24,594	30,986	60,049	5,047	824,899
1986	266,409	90,538	150,293	252,376	29,911	30,076	64,249	5,571	889,423
1987	280,561	89,988	159,771	239,620	31,365	23,051	75,375	7,457	907,188
1988	294,401	92,477	168,461	268,053	34,869	19,833	60,550	8,783	947,427
1989	300,960	104,726	168,667	266,311	37,078	22,316	59,820	10,190	970,068
1990	322,670	107,305	161,356	312,771	35,445	22,350	64,099	9,017	1,035,013

Percentage Distribution By Revenue Source

Fiscal Year	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subventio	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
1981	23	7	15	40	4	4	7	0	100
1982	22	11	17	34	3	4	9	1	100
1983	24	10	15	31	3	5	10	1	100
1984	27	11	16	29	3	5	7	1	100
1985	29	10	17	30	3	4	7	1	100
1986	30	10	17	28	3	3	7	1	100
1987	31	10	18	26	4	3	8	1	100
1988	31	10	18	28	4	2	6	1	100
1989	31	11	17	28	4	2	6	1	100
1990	31	10	16	30	3	2	6	1	100

Percentage Change

Fiscal Year	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subventio	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
-1981/1982	2	63	17	-11	-1	-9	33	691	6
-1982/1983	12	-5	-12	-6	-4	50	12	-15	0
-1983/1984	1	-6	1	-15	-2	-15	-33	-21	-9
-1984/1985	12	-8	8	4	-8	-20	4	-32	4
-1985/1986	12	14	6	3	22	-3	7	10	8
-1986/1987	5	-1	6	-5	5	-23	17	34	2
-1987/1988	5	3	5	12	11	-14	-20	18	4
-1988/1989	2	13	0	-1	6	13	-1	16	2
-1989/1990	7	3	-4	17	-4	0	7	-12	7

(1) Includes General, Special Revenue and Dept Service Funds.

(2) The information for the years 1982 through 1990 has been adjusted to the 1981 value of the dollar, using the average Consumer Price Index-Urban for each year.

Source: Department of City Planning
Office of the Controller

GENERAL REVENUES BY SOURCE (1)
1990 Fiscal Year, (In \$1000, Unadjusted)

Table 3.3.21

	Property Taxes	Business Taxes	Other Local Taxes	Grants & Subventio	Licences Fines & Penalties	Interest & Investment Earnings	Charges for Service	Other	Total
Total	457,867	152,265	228,964	443,821	50,296	31,714	90,956	12,795	1,468,678
Percent	31	10	16	30	3	2	6	1	100

(1) Includes General, Special Revenue and Dept Service Funds.

Source: Department of City Planning
Office of the Controller

been offset by the increase in property taxes of about 80 percent since 1981. Property taxes contributed 23 percent of the total budget in 1981; this share grew to 31 percent in 1990.

3.3.3.2 City Expenditures

For the year ended June 30, 1990, total City and County expenditures for the city were \$1.263 billion. Of this total expenditure, 36% went to public protection, 22% to human welfare and neighborhood development, 13% to community health, and the remaining 30% to general administration and finance; culture and recreation; public works, transportation, and commerce; and debt service.

Looking at expenditure figures in constant dollar value (adjusted to the 1981 dollar value), there was a 35% increase in expenditures from 1981 to 1990. During this 10 year period, 1985 and 1987 had the largest increases of 8.2% each year. The function that showed the largest increase was debt service, which more than doubled. Human welfare and neighborhood development is the only function to experience a decrease during the 1980s.

GENERAL GOVERNMENTAL EXPENDITURES BY FUNCTION CONSTANT DOLLAR VALUE(1)(2)
1981-1990 Fiscal Years, (\$1,000)

Table 3.3.22

Fiscal Year	Pub Works,		Human		Cult. & Comm.		Grat. Administ.		Debt Service	Total
	Public Protection	Transp. & Comm.	Welfare & Neigh. Dev't	Health	Recreation	Finance				
1981	235,222	-	33,755	196,757	80,865	42,376	48,979	17,499	655,453	
1982	275,752	43,521	181,163	99,002	47,968	64,061	16,401	727,868		
1983	271,168	41,247	177,187	104,340	62,626	78,537	21,396	756,501		
1984	292,441	45,216	168,678	71,910	63,605	62,449	23,223	727,522		
1985	307,684	47,218	172,333	83,474	67,430	87,585	21,691	787,415		
1986	311,048	46,588	171,870	91,373	70,129	67,516	21,256	779,780		
1987	324,958	51,971	181,943	97,244	76,341	91,340	19,979	843,776		
1988	322,670	51,166	181,117	102,068	77,422	96,375	24,111	854,929		
1989	309,744	46,108	180,460	100,387	74,422	98,608	23,806	833,535		
1990	318,235	53,309	193,845	115,413	82,433	90,601	36,226	890,062		

Percentage Distribution By Function

Fiscal Year	Pub Works,		Human		Cult. & Comm.		Grat. Administ.		Debt Service	Total
	Public Protection	Transp. & Comm.	Welfare & Neigh. Dev't	Health	Recreation	Finance				
1981	36	5	30	12	7	8	3	100		
1982	38	6	25	14	7	9	2	100		
1983	36	6	23	14	8	10	3	100		
1984	40	6	23	10	9	9	3	100		
1985	39	6	22	11	9	11	3	100		
1986	40	6	22	12	9	9	3	100		
1987	39	6	22	12	9	11	2	100		
1988	38	6	21	12	9	11	3	100		
1989	37	6	22	12	9	12	3	100		
1990	36	6	22	13	9	10	4	100		

Percentage Change

Fiscal Year	Pub Works,		Human		Cult. & Comm.		Grat. Administ.		Debt Service	Total
	Public Protection	Transp. & Comm.	Welfare & Neigh. Dev't	Health	Recreation	Finance				
1981-1982	17	29	-8	22	13	31	-6	11		
1982-1983	-2	-5	-2	5	31	23	31	4		
1983-1984	8	10	-5	-31	2	-21	9	-4		
1984-1985	5	4	2	16	6	40	-7	8		
1985-1986	1	-1	-0	10	4	-23	-2	-1		
1986-1987	5	12	6	6	9	35	-6	8		
1987-1988	-1	-2	-1	5	1	6	21	1		
1988-1989	-4	-10	-0	-2	-4	2	-1	-3		
1989-1990	3	16	7	15	11	-8	52	7		

(1) Includes General, Special Revenue and Dept Service Funds.

(2) Information of the years 1982 through 1990 has been adjusted to the 1981 value of the dollar, using the average Consumer Price Index-Urban for each year.

Source: Department of City Planning
Office of the Controller

GENERAL GOVERNMENTAL EXPENDITURES BY FUNCTION (1)
1990 Fiscal Year, (\$1,000, Unadjusted)

Table 3.3.23

	Pub Works,		Human		Cult. & Comm.		Grat. Administ.		Debt Service	Total
	Public Protection	Transp. & Comm.	Welfare & Neigh. Dev't	Health	Recreation	Finance				
Total	451,575	75,645	275,066	163,771	116,972	128,562	51,405	1,262,996		
Percent	36	6	22	13	9	10	4	100		

(1) Includes General, Special Revenue and Dept Service Funds.

Source: Department of City Planning
Office of the Controller

3.4 BUILDING AND LAND USE

3.4.1 BUILDING PERMIT APPLICATIONS: 1990

The data in this section are from the Bureau of Building Inspection (BBI). They include the number of building permit applications processed in 1990, the cost of projects associated with the permits, and the status of the application. These indicators are presented by C&I district and Land Use activity. The C&I district and Land Use Activity classifications are defined in the Introduction, under Data Formats, page 3. Construction work in the city consists of construction of new buildings, demolition, and alterations to existing structures. The number of building permit applications indicates the number of projects and/or sites. The construction cost measures the size of those projects. It is important to look at both indicators because in some cases applications indicate only a nominal construction cost, for example when an application is required to change the permitted use of a property but no construction is involved. Construction cost as presented in the following tables is the estimated cost of construction for each application and is reviewed by BBI. Mixed use projects are categorized according to the predominant use.

The different application statuses used by BBI are grouped into four categories:

- **Approved:** refers to all applications that have been approved whether or not the permit has been issued. (It does not include projects where construction is complete.)
- **Cancelled+:** includes applications that have been cancelled, withdrawn, revoked, or disapproved. Disapproved is a very small percentage in this group.
- **Completed:** includes applications where the authorized construction work has been completed.
- **Other:** includes applications which have not yet been acted upon, or which have been abandoned, reinstated, appealed, or with no information.

3.4.1.1 Number and construction cost of building permits in the C&I districts

As shown on Tables 3.4.1 and 3.4.2, in 1990, there were about 28,700 building permit applications with a total construction cost of about \$1.2 billion citywide. These data show that the geography of applications varies substantially from the geography of the estimated construction cost volume. The highest concentration of construction dollars is in the Financial dis-

trict, while the highest concentration of building permit applications is in the West side of the city, where most applications are for residential projects, including remodelings. The Financial District contains 28% of the construction cost, although it only represents 9% of the total number of applications. This shows that projects in the Financial District are much larger in scale, with an average cost of \$135,000. Sixty-seven percent of the total number of applications comes from the three districts on the west side of the city; 41% from the South West

Table 3.4.1

BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Financial	1,732	279	5	44	10	196	265	2,531
Civic Center	89	123	12	49	33	314	96	716
Chinatown	57	76	1	11	10	429	85	669
Van Ness	58	117	7	10	12	595	55	854
S.of Market	450	356	265	17	32	695	340	2,155
Mission	51	154	24	1	25	1,380	122	1,757
N.Central	73	204	5	10	62	3,540	298	4,192
N.West	44	121	5	0	35	3,011	162	3,378
S.West	153	428	52	5	99	9,935	994	11,666
Bay View	49	49	67	0	10	515	58	748
TOTAL	2,756	1,907	443	147	328	20,610	2,475	28,666

BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES
Percentage distribution by C&I District
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Financial	63	15	1	30	3	1	11	9
Civic Center	3	6	3	33	10	2	4	3
Chinatown	2	4	0	7	3	2	3	2
Van Ness	2	6	2	7	4	3	2	3
S.of Market	16	19	60	12	10	3	14	8
Mission	2	8	5	1	8	7	5	6
N.Central	3	11	1	7	19	17	12	15
N.West	2	6	1	0	11	15	7	12
S.West	6	22	12	3	30	48	40	41
Bay View	2	3	15	0	3	3	2	3
TOTAL	100	100	100	100	100	100	100	100

BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES
Percentage distribution by Land Use Activities
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Financial	68	11	0	2	0	8	10	100
Civic Center	12	17	2	7	5	44	13	100
Chinatown	9	11	0	2	1	64	13	100
Van Ness	7	14	1	1	1	70	6	100
S.of Market	21	17	12	1	1	32	16	100
Mission	3	9	1	0	1	79	7	100
N.Central	2	5	0	0	1	84	7	100
N.West	1	4	0	0	1	89	5	100
S.West	1	4	0	0	1	85	9	100
Bay View	7	7	9	0	1	69	8	100
TOTAL	10	7	2	1	1	72	9	100

Source: Department of City Planning
Bureau of Building Inspection

Table 3.4.2

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES
(\$1,000)
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Financial	226,859	84,069	108	6,985	13,513	8,098	2,666	342,297
Civic Center	14,650	4,559	112	2,981	20,392	12,838	107	56,639
Chinatown	4,949	4,549	35	724	236	12,885	81	23,460
Van Ness	1,863	6,673	71	162	3,832	66,995	108	79,704
So. of Market	86,359	10,359	13,135	1,425	31,640	59,401	2,169	204,488
Mission	2,152	7,784	1,696	7	777	38,328	507	51,250
N. Central	1,340	3,911	42	280	9,875	88,068	1,687	105,203
N. West	2,078	2,404	498	0	1,253	59,386	751	66,370
S. West	17,212	13,856	56,893	220	9,586	155,536	2,869	256,173
Bay View	1,753	1,646	6,311	0	2,912	13,035	330	25,987
TOTAL	359,216	139,809	78,901	12,784	94,016	514,569	11,275	1,210,570

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES
Percentage distribution by C&I District
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Financial	63	60	0	55	14	2	24	28
Civic Center	4	3	0	23	22	2	1	5
Chinatown	1	3	0	6	0	3	1	2
Van Ness	1	5	0	1	4	13	1	7
So. of Market	24	7	17	11	34	12	19	17
Mission	1	6	2	0	1	7	4	4
N. Central	0	3	0	2	11	17	15	9
N. West	1	2	1	0	1	12	7	5
S. West	5	10	72	2	10	30	25	21
Bay View	0	1	8	0	3	3	3	2
TOTAL	100	100	100	100	100	100	100	100

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND LAND USE ACTIVITIES
Percentage distribution by Land Use Activities
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Financial	66	25	0	2	4	2	1	100
Civic Center	26	8	0	5	37	23	0	100
Chinatown	21	19	0	3	1	55	0	100
Van Ness	2	8	0	0	5	84	0	100
So. of Market	42	5	6	1	15	29	1	100
Mission	4	15	3	0	2	75	1	100
N. Central	1	4	0	0	9	84	2	100
N. West	3	4	1	0	2	89	1	100
S. West	7	5	22	0	4	61	1	100
Bay View	7	6	24	0	11	50	1	100
TOTAL	30	12	7	1	8	43	1	100

Source: Department of City Planning
Bureau of Building Inspection

district, 15% from North Central, and 12% from North West. The districts which accounted for the smallest percentage of applications were Civic Center, North Beach/Chinatown, Van Ness, and the Bay View district, each with less than 3% of the City total. After the Financial District, the second and third largest shares of the city-wide construction cost are in South West and South of Market with 21% and 17% respectively. The Districts showing the smallest volume of construction cost are Bay View and North Beach/Chinatown with 2% each.

3.4.1.2 Land Use Activities reflected in building permit applications

As shown on Tables 3.4.1 and 3.4.2, the most significant Land Use activity, both in terms of number of applications and construction cost city-wide, is Residential Activity, with 72 percent of the total number of permit applications and 43 percent of construction cost. It is also the predominant Activity in terms of number of applications in every district except the Financial District. The other Land Use Activities (Office, Retail, Industrial, Cultural/Institutional, Hotel, Other), each consist of less than 10 percent of the total number of permit applications.

While Residential permits make up 72% of the total number of permits, they represent only 42% of the total construction cost. Office Activities represent less than 10% of the total number of applications, but 30% of the total construction cost. Retail is the third largest Land Use activity, both in terms of number and construction cost of permits, with 7% of the total number of permits and 12% of the total construction cost.

Office Activity is the most concentrated Land Use activity. Almost 80% of office applications and 87% of the total construction cost of office applications were located in just two districts, the Financial District and the South of Market. Industrial Activity is concentrated in the South of Market district, where almost 60% of all Industrial applications were located. An additional 15% of Industrial applications were located in the Bay View district. Residential applications are concentrated in South West district, where 48% of all residential permits applications were located. 80% of all residential permit applications were in three districts: South West, North West, and North Central. Cultural/Institutional and retail activities are the least concentrated activities, as reflected in the 1990 building permit applications. No district received more than 30% of the applications in either of these categories.

The pattern of distribution of construction cost between districts varies from the distribution of applications. For example, 15% of all retail applications were received in the Financial District, but these applications represented about 60% of the total construction cost of retail applications. This shows that the scale and expense of these retail projects was substantially more ambitious than retail projects elsewhere in the City, and may be more likely to involve new construction than alterations to existing buildings. While the Financial District and Civic Center had similar percentages of the total number of Hotel applications (30% and 33%, respectively), 55% of the total construction cost of hotel applications was for Financial District projects, and 23% for Civic Center projects.

3.4.1.3 Average Construction Cost

Table 3.4.3 shows the average construction cost of application by Land Use Activity and by C&I District. By Land Use Activity, Cultural/Institutional applications had the highest average cost of \$278,000. Average cost for Industrial and Office applications figure was the second and third highest with \$164,000 and \$130,000 respectively. Residential projects had the lowest average cost of \$24,000.

Not surprisingly, the districts with the bulk of the more expensive office and industrial projects have the highest average application costs. The Financial District shows the highest average of \$135,000 per project, followed by South of Market with \$95,000 per project, and Van Ness with \$93,000 per project. The lowest averages are found in the West Districts, where most of the residential projects were located.

Table 3.4.3 AVERAGE CONSTRUCTION COST BY BUILDING APPLICATIONS BY C&I DISTRICT 1990

	Construction Cost (\$1,000)	Applications	Average Construction Cost/Application (\$1,000)
Financial	342,297	2,531	135
Civic Center	55,639	716	78
Chinatown	23,460	669	35
Van Ness	79,704	854	93
S.of Market	204,488	2,155	95
Mission	51,250	1,757	29
N.Central	105,203	4,192	25
N.West	66,370	3,378	20
S.West	256,173	11,666	22
Bay View	25,987	748	35
TOTAL	1,210,570	28,666	42

AVERAGE CONSTRUCTION COST BY BUILDING APPLICATIONS BY LAND USE ACTIVITY 1990

	Construction Cost (\$1,000)	Applications	Average Construction Cost/Application (\$1,000)
Office	357,463	2,756	130
Retail	138,164	1,907	72
Industrial	72,590	443	164
Hotel	12,784	147	87
Cult./Instl	91,103	328	278
Residential	501,534	20,610	24
Other	10,945	2,475	4
TOTAL	1,184,583	28,666	41

Source: Department of City Planning
Bureau of Building Inspection

3.4.1.4 Application Status

Application status gives an indication of the likelihood of projects applied for in any year to be carried out. During uncertain economic times we might expect to see an increase in projects withdrawn, or in projects which are approved, but never completed. The number of completed projects is also a more precise measure of the amount of money spent on construction in any year, and of the number of projects being readied for occupancy, than is the number of applications filed.

Application status also has an element of time. Successful projects move from one category to another over time. First they are approved, then they remain in that category for a period of time until construction is completed. This amount of time varies considerably depending on the complexity of the project and the diligence with which it is pursued, but the number and cost of projects at early stages in the process will indicate the amount of actual construction likely to occur in the near future.

In 1990, 45% of applications which passed through BBI were approved in the course of the year but not completed, 40% were completed, 15% were cancelled or in other categories. 56% of office applications were approved and 36% completed, while 40% of the residential applications were approved and 44% completed. This may be because less time typically elapses between when residential projects are approved and when they are completed.

Sixty-one percent of the total construction cost corresponded to approved applications, 12% to construction work completed, and 25% to "other" (which includes projects under review).

While Residential Activities represent the highest percentage of applications approved (64%), these same applications account for 37% of the construction cost, again reflecting the lower average cost of residential projects.

Table 3.4.4

BUILDING APPLICATIONS BY APPLICATION DISPOSITION AND LAND USE ACTIVITY
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Approved	1532	851	234	84	175	8199	1804	12,879
Cancelled+	980	706	145	38	83	9058	403	11,413
Completed	136	186	27	13	24	1788	104	2,278
Other	108	164	37	12	44	1565	166	2,096
TOTAL	2,756	1,907	443	147	326	20,610	2,477	28,666

BUILDING APPLICATIONS BY APPLICATION DISPOSITION AND LAND USE ACTIVITY
Percentage distribution by application disposition
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Approved	56	45	53	57	54	40	73	45
Cancelled+	36	37	33	26	25	44	16	40
Completed	5	10	6	9	7	9	4	8
Other	4	9	8	8	14	8	7	7
TOTAL	100	100	100	100	100	100	100	100

BUILDING APPLICATIONS BY APPLICATION DISPOSITION AND LAND USE ACTIVITY
Percentage distribution by Land Use Activities
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Approved	12	7	2	1	1	64	14	100
Cancelled+	9	6	1	0	1	79	4	100
Completed	6	8	1	1	1	78	5	100
Other	5	8	2	1	2	75	8	100
TOTAL	10	7	2	1	1	72	9	100

Source: Department of City Planning
Bureau of Building Department

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION DISPOSITION & LAND USE ACTIVITY
(\$1,000)
1990

Table 3.4.5

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Approved	242,062	91,943	68,833	8,025	43,718	272,313	7,513	734,407
Cancelled+	59,530	13,839	1,651	627	1,171	69,914	2,794	149,527
Completed	3,575	3,291	745	388	921	18,145	461	27,526
Other	54,049	30,736	7,672	3,744	18,202	154,196	30,510	299,111
TOTAL	359,216	139,809	78,901	12,784	64,013	514,569	41,278	1,210,570

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION DISPOSITION & LAND USE ACTIVITY
Percentage distribution by application disposition
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Approved	67	66	87	63	68	53	18	61
Cancelled+	17	10	2	5	2	14	7	12
Completed	1	2	1	3	1	4	1	2
Other	15	22	10	29	28	30	74	25
TOTAL	100	100	100	100	100	100	100	100

CONSTRUCTION COST OF BUILDING APPLICATIONS BY APPLICATION DISPOSITION & LAND USE ACTIVITY
Percentage distribution by Land Use Activities
1990

	Office	Retail	Industrial	Hotel	Cult./Instl	Residential	Other	TOTAL
Approved	33	13	9	1	6	37	1	100
Cancelled+	40	9	1	0	1	47	2	100
Completed	13	12	3	1	3	66	2	100
Other	18	10	3	1	6	52	10	100
TOTAL	30	12	7	1	5	43	3	100

Source: Department of City Planning
Bureau of Building Department

Table 3.4.6**BUILDING APPLICATIONS BY C&I DISTRICT AND APPLICATION STATUS
1990**

	Approved	Cancelled+	Completed	Others	TOTAL
Financial	1,419	134	882	96	2,531
Civic Center	361	52	225	78	716
Chinatown	291	80	251	47	669
Van Ness	345	92	352	66	854
S.of Market	1,197	124	672	162	2,155
Mission	794	194	618	151	1,757
N.Central	1,994	486	1,431	281	4,192
N.West	1,171	444	1,541	222	3,378
S.West	4,978	638	5,136	914	11,666
Bay View	329	34	306	80	749
TOTAL	12,879	2,278	11,413	2,096	28,666

**BUILDING APPLICATIONS BY C&I DISTRICT AND APPLICATION STATUS
Percentage distribution by C&I District
1990**

	Approved	Cancelled+	Completed	Others	TOTAL
Financial	11	6	8	5	9
Civic Center	3	2	2	4	3
Chinatown	2	4	2	2	2
Van Ness	3	4	3	3	3
S.of Market	9	5	6	8	8
Mission	6	9	5	7	6
N.Central	15	21	13	13	15
N.West	9	19	14	11	12
S.West	39	28	45	44	41
Bay View	3	1	3	4	3
TOTAL	100	100	100	100	100

**BUILDING APPLICATIONS BY C&I DISTRICT AND APPLICATION STATUS
Percentage distribution by application disposition
1990**

	Approved	Cancelled+	Completed	Others	TOTAL
Financial	56	5	35	4	100
Civic Center	50	7	31	11	100
Chinatown	44	12	38	7	100
Van Ness	40	11	41	8	100
S.of Market	56	6	31	8	100
Mission	45	11	35	9	100
N.Central	48	12	34	7	100
N.West	35	13	46	7	100
S.West	43	5	44	8	100
Bay View	44	5	41	11	100
TOTAL	45	8	40	7	100

Source: Department of City Planning
Bureau of Building Inspection

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND STATUS
(\$1,000)
1990

Table 3.4.7

	Approved	Cancelled+	Completed	Others	TOTAL
Financial	230,522	4,181	48,322	59,273	342,297
Civic Center	32,405	524	3,075	19,634	55,639
Chinatown	11,261	1,148	3,178	7,873	23,460
Van Ness	24,777	848	3,876	50,202	79,704
S.of Market	140,297	1,579	18,952	43,659	204,488
Mission	30,970	1,405	5,017	13,859	51,250
N.Central	59,625	4,054	13,863	27,660	105,203
N.West	33,125	4,528	16,761	11,955	66,370
S.West	156,225	7,854	33,542	58,551	256,173
Bay View	15,198	1,404	2,940	6,443	25,987
TOTAL	734,407	27,526	149,527	299,111	1,210,570

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND STATUS
Percentage distribution by C&I District
1990

	Approved	Cancelled+	Completed	Others	TOTAL
Financial	31	15	32	20	28
Civic Center	4	2	2	7	5
Chinatown	2	4	2	3	2
Van Ness	3	3	3	17	7
S.of Market	19	6	13	15	17
Mission	4	5	3	5	4
N.Central	8	15	9	9	9
N.West	5	16	11	4	5
S.West	21	29	22	20	21
Bay View	2	5	2	2	2
TOTAL	100	100	100	100	100

CONSTRUCTION COST OF BUILDING APPLICATIONS BY C&I DISTRICT AND STATUS
Percentage distribution by application disposition
1990

	Approved+	Cancelled+	Completed	Others	TOTAL
Financial	67	1	14	17	100
Civic Center	58	1	6	35	100
Chinatown	48	5	14	34	100
Van Ness	31	1	5	63	100
S.of Market	69	1	9	21	100
Mission	60	3	10	27	100
N.Central	57	4	13	26	100
N.West	50	7	25	18	100
S.West	61	3	13	23	100
Bay View	58	5	11	25	100
TOTAL	61	2	12	25	100

Source: Department of City Planning
Bureau of Building Inspection

3.4.2 LAND USE AND ZONING

The building permit application data described above show proposed and actual changes in the uses of buildings and land during 1990. It does not describe how existing land use activities are distributed over all of the City's land and throughout its structures. The Department of City Planning conducted a survey of the amount of land contained in different zoning districts citywide in 1989. The last time a citywide land use survey was conducted was in 1970. The Department is currently surveying and recording land use as area plans are undertaken for subareas of the city. Surveys have been done in the Central Waterfront, Northeast Mission Industrial Zone, and South Van Ness/Hayes Valley. Subsequent Commerce and Industry Inventories will include data from new surveys as they are completed.

3.4.2.1 Zoning

Table 3.4.8 shows the amount of land in various zoning districts in the C&I districts. These calculations were performed by the Department of City Planning in 1989. The information is presented in acres, which include streets in addition to usable land area. The "Commercial" classification includes all of the "C" zoning districts (C-1, C-2, C-3). These are areas in which retail trade, offices, hotels and other commercial activities are generally permitted. The "Industrial" classification includes the "M" districts (M-1, M-2) where industrial activities are generally permitted. "Neighborhood Commercial" includes the various "NC" districts, which are smaller scale commercial districts with substantial residential components. "Public," or "P" districts are those owned by governments and used for public purposes. "RC," "RH," and "RM" districts are predominantly residential districts with respectively, a commercial component, a small-scale "house" character, and a "mixed" house and multi-unit character. For more description of these zoning districts, and their location, see the City Planning Code.

The acreage with different zoning classifications was not calculated by C&I District, but it can be aggregated into C&I districts with the exception of the Financial, Civic Center, North Beach/Chinatown, and Van Ness Districts which are merged into an area called "North East."

Table 3.4.8 shows that most of the commercially-zoned area (68%) is in the North East districts; that South of Market and Bay View districts together contain 94% of industrially-zoned land;

and that a large proportion of residentially-zoned land is located in the remaining districts, especially the South West, North West, and North Central districts.

In four districts (Mission, South West, North West, and North Central) RH-zoned land is the largest proportion of land. In two districts (South of Market and Bay View), industrially-

Table 3.4.8

ZONING BY C&I DISTRICTS*
(Acres)
1989

ZONING	Neighbhd.							TOTAL
	Commercial	Industrial	Commercial	Public	RC District	RH District	RM District	
North East*	794.2	63.6	128.7	181.2	244.4	142.6	345.4	1,900.1
South of Market	110.9	1,686.3	86.2	171.3	33.5	96.1	47.9	2,232.3
Mission	122.5	128.3	237.9	260.3	1.5	1,881.7	176.7	2,808.9
North Central	11.1	0.0	385.9	360.8	46.0	1,145.8	887.0	2,836.6
North West	0.0	0.0	209.2	533.8		1,344.7	396.3	2,484.0
South West	42.2	15.4	582.1	3,638.3	0.0	9,144.2	600.5	14,022.6
Bay View	92.0	1,628.9	61.9	724.1	0.0	890.6	161.4	3,558.8
TOTAL	1,172.9	3,522.4	1,691.9	5869.7	325.4	14,645.8	2,615.2	29,843.2

ZONING BY C&I DISTRICTS*
Percentage Distribution by C&I District

ZONING	Neighbhd.							TOTAL
	Commercial	Industrial	Commercial	Public	RC District	RH District	RM District	
North East*	68	2	8	3	75	1	13	6
South of Market	10	48	5	3	10	1	2	8
Mission	10	4	14	4	1	13	7	10
North Central	1	0	23	6	14	8	34	9
North West	0	0	12	9	0	9	15	8
South West	4	0	34	62	0	62	23	47
Bay View	8	46	4	12	0	6	6	12
TOTAL	100	100	100	100	100	100	100	100

ZONING BY C&I DISTRICTS*
Percentage Distribution by Zoning

ZONING	Neighbhd.							TOTAL
	Commercial	Industrial	Commercial	Public	RC District	RH District	RM District	
North East*	42	3	7	10	13	8	18	100
South of Market	5	76	4	8	2	4	2	100
Mission	4	5	9	9	0	67	6	100
North Central	0	0	14	13	2	40	31	100
North West	0	0	8	22	0	54	16	100
South West	0	0	4	26	0	65	4	100
Bay View	3	46	2	20	0	25	5	100
TOTAL	4	12	6	20	1	49	9	100

Source: City Planning Department, 1989

Note: * North East District merges Financial, Civic Center, North Beach/Chinatown & Van Ness Districts. These Districts have been merged because the original data were compiled by Planning Districts.

zoned land is the largest. In the North East district, more land is zoned commercial than any of the other categories.

3.4.2.2. Land Use

Tables 3.4.9 and 3.4.10 display the amount of land devoted to different land uses. (The use of land may differ from its zoning since many zoning districts permit several uses and contain non-conforming uses.) The information in Table 3.4.9 was collected in 1970 by the Department of City Planning, and covers the entire city. It shows that in 1970, 40% of the city's land was devoted to residential uses (including hotels). Public uses occupied 33% of the city's land. Nine percent of the land was vacant. Other uses occupied smaller proportions of the land.

Table 3.4.10 displays more recent land use data for three areas of the city, the Central Waterfront, the Northeast Mission Industrial Zone, and the South Van Ness/Hayes Valley study area. Since 1987, whenever new area plans have been undertaken, land use surveys, using fairly consistent methodologies and formats, have been conducted. These are the first three areas to be systematically surveyed. As more area plans are undertaken, this land use data base will grow and become more useful. These data are presented here for information, even though they do not all use the same definitions of use and do not correspond to the districts that have been established for the rest of the C&I Inventory. Presenting information, developing, improving, and maintaining data sources, and interpreting and developing consistency between different data sources, are among the goals of the C&I Inventory.

This table allows a comparison between these three districts. In both the Central Waterfront and the Northeast Mission Industrial Zone, industrial uses occupy a larger proportion of land than any other use (60% in the Central Waterfront and 40% in the Northeast Mission Industrial Zone). In the South Van Ness/Hayes Valley study area the largest use of land is office (36%). Residential uses occupy 11 to 14% of the land in the South Van Ness/Hayes Valley study area and the Northeast Mission Industrial Zone, but only 3% in the Central Waterfront.

Table 3.4.9

Land use category	Partial Area	Total Area	Partial %	Total %
GROSS AREA		30,500.36		
NET AREA		23,101.68		100
RESIDENTIAL TOTAL		9,114.31		39
SINGLE FAMILY DETACHED	1,844.08		8	
SINGLE FAMILY ROW	4,234.88		18	
TWO FAMILY	1,174.57		5	
THREE TO FOUR FAMILY	584.30		3	
FIVE TO NINE FAMILY	362.75		2	
TEN TO FORTYNINE FAMILY	443.22		2	
FIFTY +	106.75		0	
ROOM AND BOARD HOUSES	31.31		0	
HOTEL AND MOTEL	43.08		0	
PUBLIC HOUSING	289.37		1	
COMMERCE TOTAL		1,477.09		6
RETAIL AND OFFICE	919.57		4	
GAS STATION	109.47		0	
PARKING GARAGE	32.01		0	
USED CAR OR PARKING LOT	399.72		2	
OTHER OPEN AIR COMMERCE	16.31		0	
INDUSTRY TOTAL		1,360.55		6
STRUCTURAL LIGHT	598.92		3	
STRUCTURAL INTERMEDIATE	238.32		1	
STRUCTURAL HEAVY	269.90		1	
OPEN AIR LIGHT	82.07		0	
OPEN AIR INTERMEDIATE	77.53		0	
OPEN AIR HEAVY	93.82		0	
UTILITY TOTAL		563.31		2
TRUCK OR BUS TERMINAL	83.59		0	
RAILROAD TRACKS OR TERM	361.42		2	
OTHER UTILITY	118.30		1	
INSTITUTION TOTAL		595.68		3
PRIVATE OR PARC. SCHOOL	150.43		1	
REST HOME	24.14		0	
HOSPITAL	166.40		1	
CHURCH	158.27		1	
OTHER	96.45		0	
PUBLIC TOTAL		7,594.72		33
FEDERAL	2,184.99		9	
STATE	561.92		2	
CITY	4,729.01		20	
INTERNATIONAL	1.73		0	
REDEVELOPMENT AGENCY	103.98		0	
BAY AREA RAPID TRANSIT	13.09		0	
PRIVATE RECREATION TOTAL		311.62		1
VACANT TOTAL		2,084.40		9
OPEN VACANT	1,022.35		4	
TIDELANDS	949.76		4	
BEACH	112.29		0	

Source: Department of City Planning

Table 3.4.10 AREA BY LAND USE ACTIVITY AND STUDY AREA
(Square feet)
1987-1991

Study Area	Cultural/ Institutional	Industrial	Office	Residential	Retail	Hotel	TOTAL
Central Waterfront	431	9,533	4,620	454	721	36	15,795
North East Mission Industrial Zone	1,504	5,828	2,467	1,581	2,913	172	14,465
South Van Ness/Hayes Valley	788	554	2,327	871	1,674	178	6,392
TOTAL	2,723	15,936	9,608	2,917	5,311	388	36,883

AREA BY LAND USE ACTIVITY AND STUDY AREA
Percentage distribution by Land Use Activities
1987-1991

Study Area	Cultural/ Institutional	Industrial	Office	Residential	Retail	Hotel	TOTAL
Central Waterfront	3	60	29	3	5	0	100
North East Mission Industrial Zone	10	40	17	11	20	1	100
South Van Ness/Hayes Valley	12	9	36	14	26	3	100
TOTAL	7	43	26	8	14	1	100

Source: Department of City Planning

Table 3.4.11 NUMBER OF LOTS BY LAND USE ACTIVITY AND STUDY AREA
1987-1991

Study Area	Cultural/ Institutional	Industrial	Office	Residential	Retail	Hotel	TOTAL
Central Waterfront	15	236	179	103	42	0	575
North East Mission Industrial Zone	32	181	95	252	173	10	743
South Van Ness/Hayes Valley	29	27	64	80	161	5	366
TOTAL	76	444	338	435	376	15	1,684

NUMBER OF LOTS BY LAND USE ACTIVITY AND STUDY AREA
Percentage distribution by Land Use Activities
1987-1991

Study Area	Cultural/ Institutional	Industrial	Office	Residential	Retail	Hotel	TOTAL
Central Water Front	3	41	31	18	7	0	100
North East Industrial Zone	4	24	13	34	23	1	100
South Van Ness Hayes Valley	8	7	17	22	44	1	100
TOTAL	5	26	20	26	22	1	100

Source: Department of City Planning

